



Washington State Transportation Commission
Ferry Riders Opinion Group (FROG) Survey Panel
May 2016 Survey of Freight Shippers Using WSF
Final Report

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.

The FROG research initiative in 2016 consists of the following main phases:

- Winter Customer Survey Study (target audience: commuter riders) via FROG
- **Freight Survey (target audience: WSF freight customers) via executive telephone survey**
- General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS
- Summer On-board Recreational Survey (target audience: Out of state riders)
- Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)

The focus of this report is the Freight Survey

EMC Project/Document #: 16-6025

Contents



Methodology	4
Executive Summary	5
Detailed Study Findings:	
• Fleet Profile	11
• Ferry Usage	16
• Travel Flexibility	29
• Wait Times	32
• Reservations	35
• Potential Congestion Pricing	44
• Appendix	51

Methodology



- ▶ Telephone survey of Freight Shippers on WA State Ferries
- ▶ May 23rd – June 3rd, 2016
- ▶ 100 total interviews; see Appendix for list of companies
- ▶ Respondents were screened to meet the following criteria:
 - Be the person responsible for scheduling freight trips on ferries for the trucks in their fleet
 - Use WSF to transport goods and services by truck
- ▶ Interviewing conducted by trained, professional interviewers

Please note that due to rounding, some percentages may not add up to exactly 100%.

Executive Summary



Fleet Profile*

- Freight customers represent a wide variety of industries; more than a quarter (29%) of freight customers are in Wholesale/Retail, followed by Construction (which jumped from 12% in 2014 to 20% in 2016) and City delivery trucking (6%). Manufacturing dropped from 14% in 2014 to 5% in the current year.
- A majority (53%) of deliveries are made to retail or commercial businesses, followed by residential (33%) and construction sites (28%).
- Just over half of customers (54%) have 1-10 trucks in their fleet and more than a third (40%) have 11 or more.
- The average fleet size is 30 including one outlier fleet of 1,500 trucks and 19 without the outlier. This is down from 2014 where the average fleet size was 47 trucks including UPS's fleet of 3,500 trucks and 17 trucks without including the UPS fleet.
- On average, just over half (52%) of freight customers' trucks use Washington State Ferries.
- Of the trucks that use WSF in 2016, 61% are under 40 feet in length and 80% are under 60 feet. Overall truck size has decreased since 2014 when 49% of trucks were 50 feet or longer compared to only 33% in 2016.

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*

Executive Summary



Ferry Usage*

- More than half of freight customers (52%) use WSF at least weekly. For those whose trips vary by season, they average 10 spring/summer trips (down from 29 in 2014) compared to 7 fall/winter trips (down from 23 in 2014). Companies whose freight trips are consistent year-round average 15 trips per month in 2016 (down from 18 in 2014).
- Freight trips are skewed towards peak hours, with few freight trips at night. However, since 2014 there has been a significant decrease in peak trips.
- Mukilteo/Clinton is the single most used route (23%), followed by Edmonds/Kingston (19%) and Seattle/Bainbridge (15%).
- The majority of companies say frequency of ferry use has not changed, with a quarter (24%) increasing and 9% (n=9) decreasing frequency. Of the 9 companies whose trips decreased, 3 mentioned changes in delivery schedules and 3 mentioned a loss of customers or less work.
- Most companies (88%) say Washington State Ferries provide a good value. Overall, the perception of WSF as a good value has increased from 2014 to 2016. In addition, the intensity has risen, as more people find it to be a 'very good value' and no one finds it to be a 'very poor value.'

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*

Executive Summary



Travel Flexibility*

- Almost half have at least some flexibility when selecting travel time and 32% (down from 40% in 2014) have at least some flexibility when selecting travel day. However, 52% lack flexibility when it comes to time of day and 63% lack flexibility for day of week (up from 54% in 2014).

Wait Times

- Three quarters (75%) of freight customers say wait times are at least a minor issue.
- The Anacortes/San Juans route has the most mentions of long wait times, with an average 1.9 boat wait (down from 2.6 in 2014), although sample sizes are extremely small.
- Overall, wait times are less of an issue now than they were in 2014.

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*

Executive Summary



Reservations*

- Most companies (94%) have a business account with WSF. Over four-fifths (83%) are aware of WSF's vehicle reservation system, which is up from 72% in 2014.
- Of those customers who use the Coupeville/Port Townsend or Anacortes routes, the majority always (70%) utilize the reservation system and 11% use it often. This is a dramatic change from 2014 where only 39% of customers always used the system and 21% used it often. Of those customers who use the reservation system, most are satisfied (89% in 2016 compared to 92% in 2014).
- The Coupeville/Port Townsend and Anacortes reservation system has become more popular in the last two years, with the percentage of people who never use it dropping from 21% to 3%. Additionally, the percentage of people who always use it has risen by 31%.

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*

Executive Summary



Potential Reservation System*

- Of those customers who use Central Puget Sound ferry routes (n=75), two thirds (63%) would not change their ferry usage given a reservation system, and only 16% would increase usage.
- Of those who would be open to a vehicle reservation system for Central Puget Sound routes (n=74), over half (51%) say they would be likely to use the system as described with a 25% deposit.
- Almost two-thirds (64%) say not charging a no-show fee would make some difference in their likelihood to use the system. This is an increase from the 54% who said it would make a difference in 2014.

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*

Executive Summary



Congestion Pricing*

- By a 53% to 17% margin, freight shippers disagree that they should be charged a premium over regular freight fares if they travel during peak periods – even when the increase is coupled with a discount for non-peak travel.
- Overall, freight shippers are more opposed to the idea of congestion pricing than in 2014 (53% vs. 44%).
- 42% of customers who travel in peak times (n=74) say they would move trips to off-peak times if they were charged between 1.5 and 3 times the current freight vehicle fare. This is down from 50% in 2014.
- A quarter of all customers say they would move trips to overnight if fares were cut in half for that time period. Those who would not move because of cheaper fares say they lack the flexibility to change the time.
- Most freight customers say a secure parking area on the arrival side would not make them more likely to schedule ½-priced late-night ferry sailings.

**Unless otherwise noted, results from 2016 are similar to data collected in 2014*



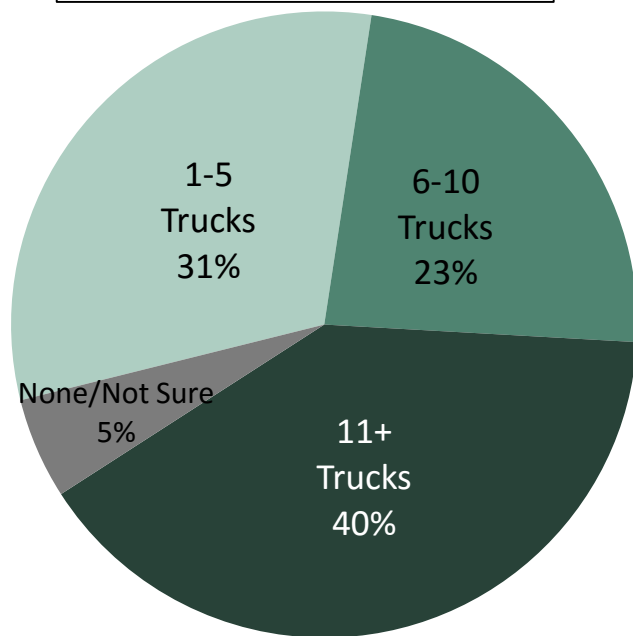
Fleet Profile

Fleet Profile



The 2016 average fleet size is 30 including one outlier fleet of 1,500 trucks and 19 without the outlier. Just over half of customers (54%) have 1-10 trucks in their fleet and more than a third (40%) have 11 or more. On average, just over half of the trucks in a fleet use Washington State Ferries. Of the trucks that use WSF, 61% are under 40 feet in length and 80% are under 60 feet.

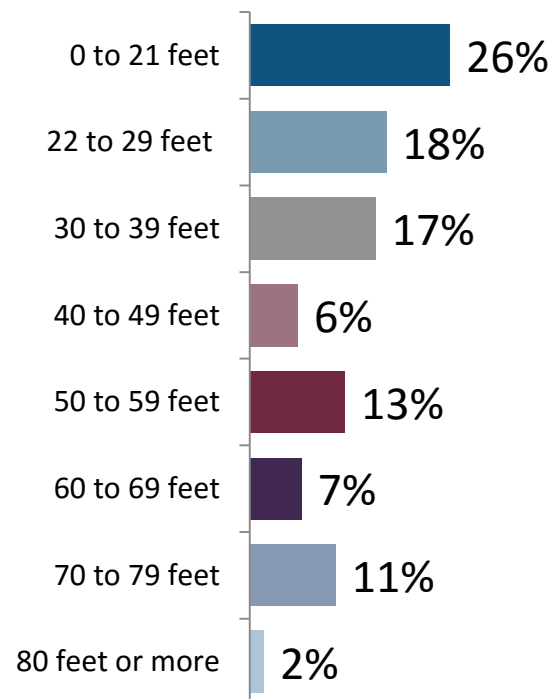
2016 Number of Trucks in Fleet
(n=115)



Mean: 30.1 (18.9*)
*without outlier

52% of Trucks
use WSF

2016 Size of Trucks Traveling on WSF
(n=100)



Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

Q3. And how many of those trucks use Washington State Ferries? Again an estimate is fine.

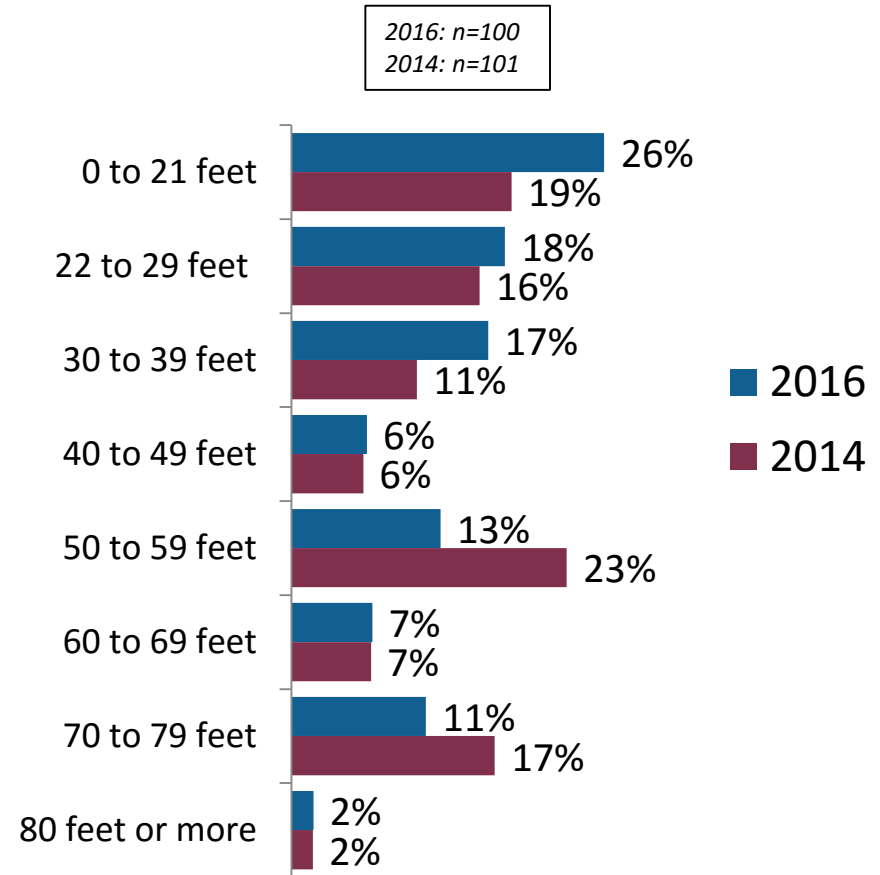
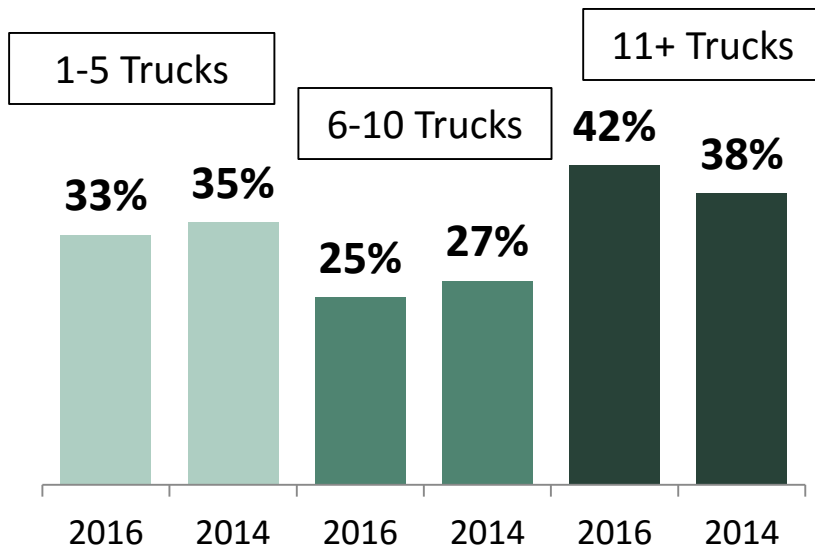
Q9. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

Fleet Profile – Comparison



Fleet sizes for the freight companies in the 2016 survey are similar to the 2014 survey. Overall truck size has decreased since 2014 when 49% of trucks were 50 feet or longer compared to only 33% in 2016.

2016: n=109, 52% of fleet use WSF
2014: n=104, 54% of fleet use WSF



Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

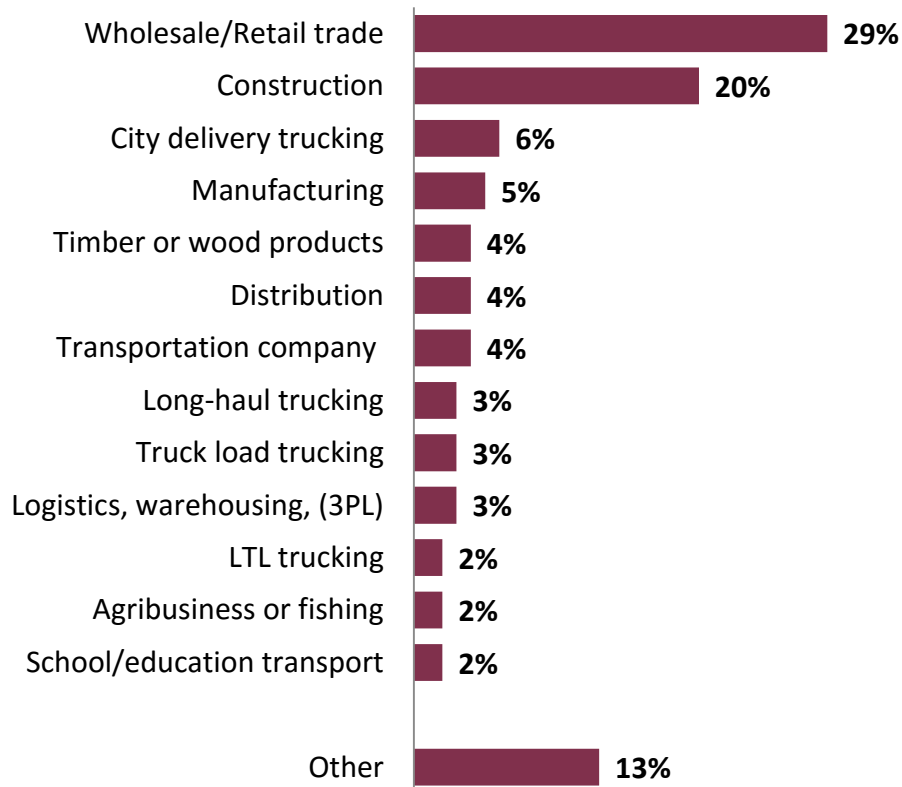
Q9. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

Fleet Profile



More than a quarter (29%) of freight customers are in Wholesale/Retail, followed by Construction (20%) and City delivery trucking (6%). A majority (53%) of deliveries are made to retail or commercial businesses, followed by residential (33%) and construction sites (28%).

Business Categories



Location Delivered to (by types)	Total (Q13)	Most Freight (Q14)
Retail or commercial businesses	53%	27%
Residential locations	33%	27%
Construction sites	28%	23%
Warehouses	26%	10%
Some other type of place or location	10%	3%
School/educational locations	2%	--
(DNR: Don't Know)	3%	10%

Q12. Which of the following categories best describes your company's line of business?

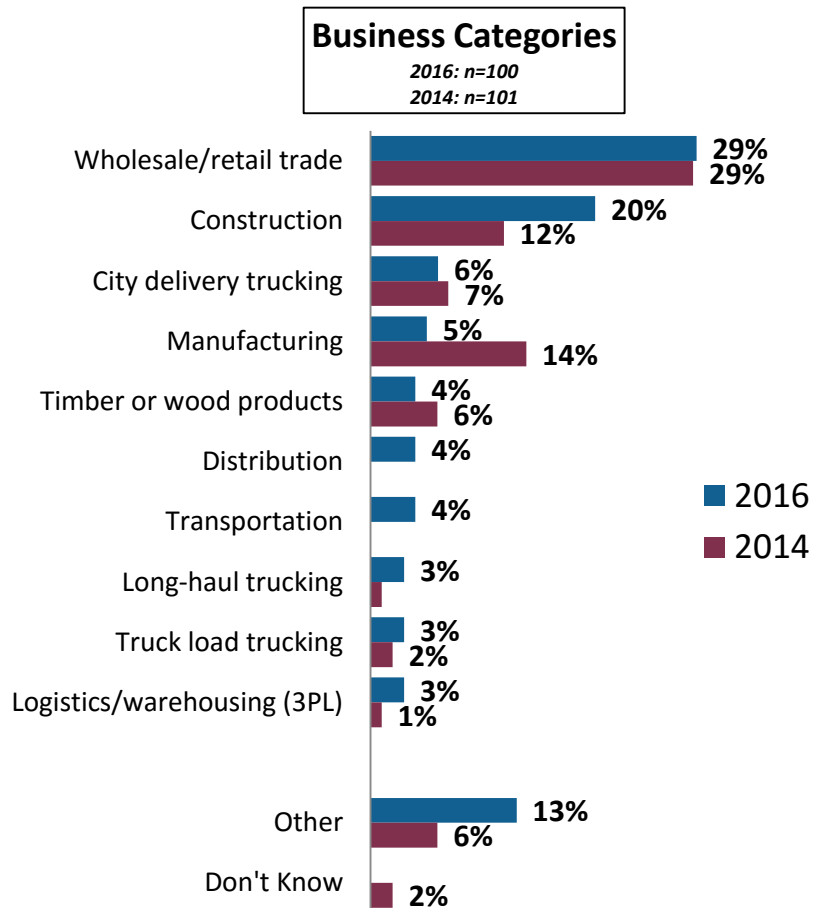
Q13. Using the ferries, which location type do you deliver freight to? **[MULTI RESPONSE]**

Q14. And, which location type do you deliver the most freight to?

Fleet Profile – Comparison



Construction is up from 12% in 2014 to a fifth in 2016 (20%). Manufacturing decreased from 14% to 5% and wholesale/retail trade did not change. Many of these differences are a function of the type of companies interviewed.



Location Delivered to (by types)	Total		Most Freight	
	2016	2014	2016	2014
Retail or commercial businesses	53%	56%	27%	19%
Residential locations	33%	40%	27%	30%
Construction sites	28%	30%	23%	41%
Warehouses	26%	8%	10%	--
Some other type of place or location	10%	6%	3%	4%
School/educational locations	2%	3%	--	--
Don't Know	3%	3%	10%	7%

Q12. Which of the following categories best describes your company's line of business?

Q13. Using the ferries, which location type do you deliver freight to? **[MULTI RESPONSE]**

Q14. And, which location type do you deliver the most freight to?



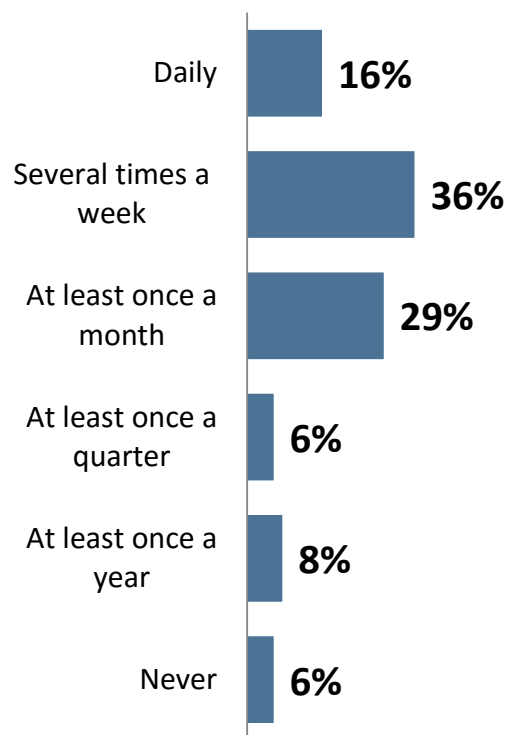
Ferry Usage

Ferry Usage

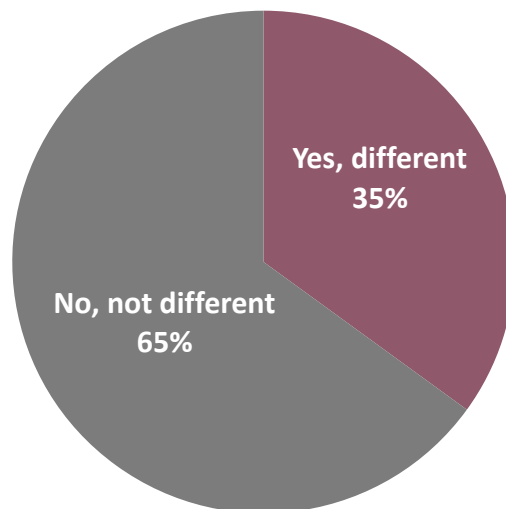


More than half of freight customers (52%) use WSF at least weekly in 2016. For those whose trips vary by season (35%), they average 10 spring/summer trips compared to 7 fall/winter trips. Companies whose freight trips are consistent year-round average 15 trips per month.

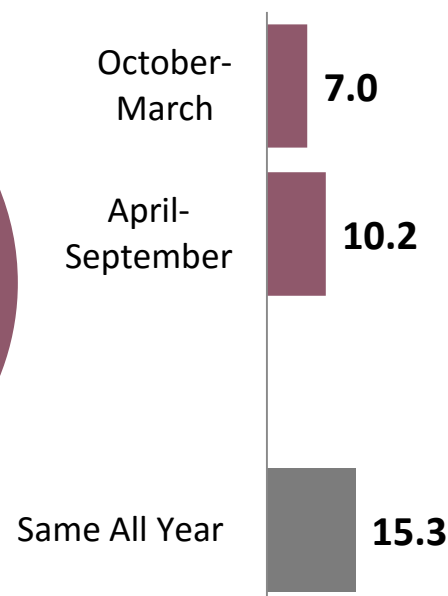
2016 Frequency of Ferry Trips



2016 Truck Crossing - Seasonal Difference



2016 Average Number of Trips by Season



Q4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?

Q5. Is the average number of ferry crossings made by your trucks different October through March than April through September?

Q6/Q7/Q8. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March, April through September, and in a typical month. Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

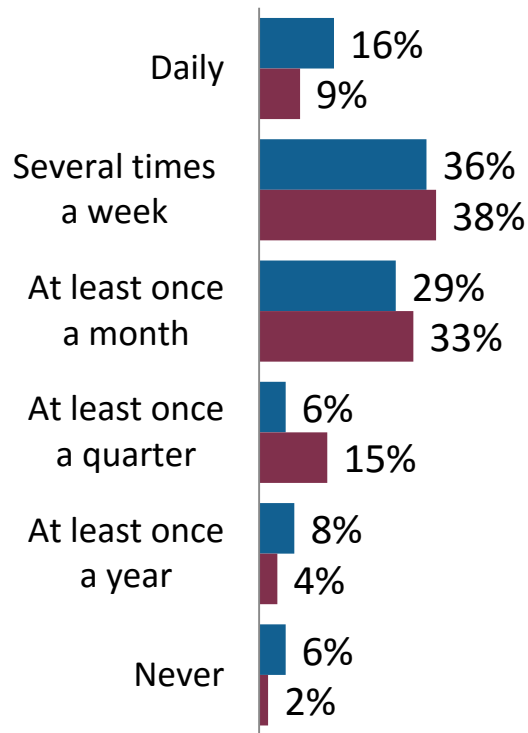
Ferry Usage – Comparison



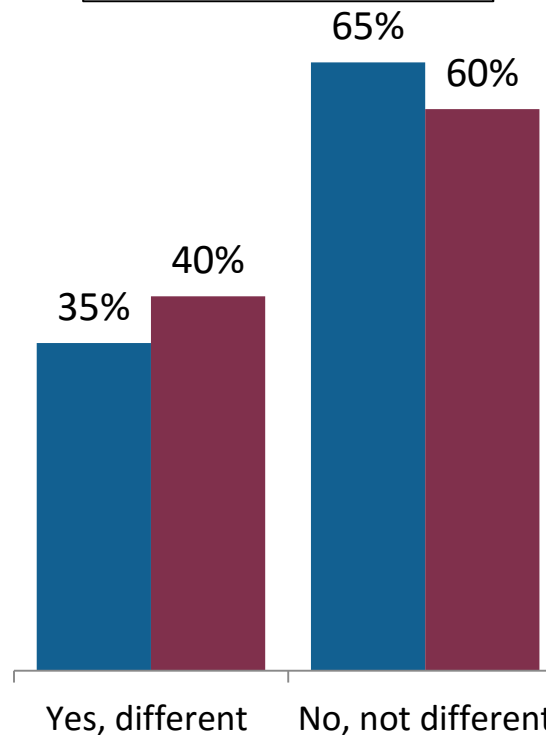
Frequency of ferry trips and seasonal truck crossings are similar in 2016 and 2014. Average number of trips in both summer and winter have fallen dramatically.

■ 2016 ■ 2014

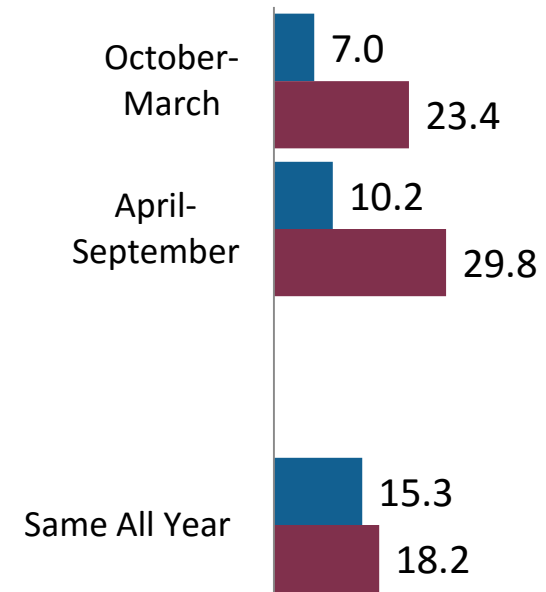
Frequency of Ferry Trips



Truck Crossing – Seasonal Difference



Average Number of Trips by Season



Q4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?

Q5. Is the average number of ferry crossings made by your trucks different October through March than April through September?

Q6/Q7/Q8. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March, April through September, and in a typical month. Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

Routes Travelled



Edmonds/Kingston is the most frequently used route overall, but Mukilteo/Clinton is the single most used route.

<i>Route</i>	<i>Total Use (Q10)</i>	<i>Most Used (Q11)</i>
Edmonds / Kingston	41%	19%
Mukilteo / Clinton	33%	23%
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	33%	10%
Seattle / Bainbridge	28%	15%
Fauntleroy / Vashon	15%	2%
Coupeville / Port Townsend	15%	2%
Seattle / Bremerton	12%	4%
Vashon / Southworth	10%	2%
Point Defiance / Tahlequah	8%	2%
Fauntleroy / Southworth	7%	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	7%	--
Anacortes / Sidney	6%	--
Don't know/Refused	5%	2%
Routes used equally	--	19%

Q10. What ferry routes do you use for moving freight? [MULTI RESPONSE]

[IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

Q11. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q10]

Routes Travelled – Comparison



As in 2014, Edmonds/Kingston is the most frequently used route overall. Unlike 2014, Mukilteo/Clinton is the single most used route in 2016.

Route	Total Use		Most Used	
	2016	2014	2016	2014
Edmonds / Kingston	41%	36%	19%	20%
Mukilteo / Clinton	33%	30%	23%	14%
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	33%	29%	10%	8%
Seattle / Bainbridge	28%	23%	15%	14%
Fauntleroy / Vashon	15%	14%	2%	--
Coupeville / Port Townsend	15%	12%	2%	2%
Seattle / Bremerton	12%	14%	4%	12%
Vashon / Southworth	10%	10%	2%	4%
Point Defiance / Tahlequah	8%	6%	2%	2%
Fauntleroy / Southworth	7%	6%	--	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	7%	9%	--	--
Anacortes / Sidney	6%	3%	--	2%
Routes used Equally	--	--	19%	14%
Don't know/Refused	5%	5%	2%	6%

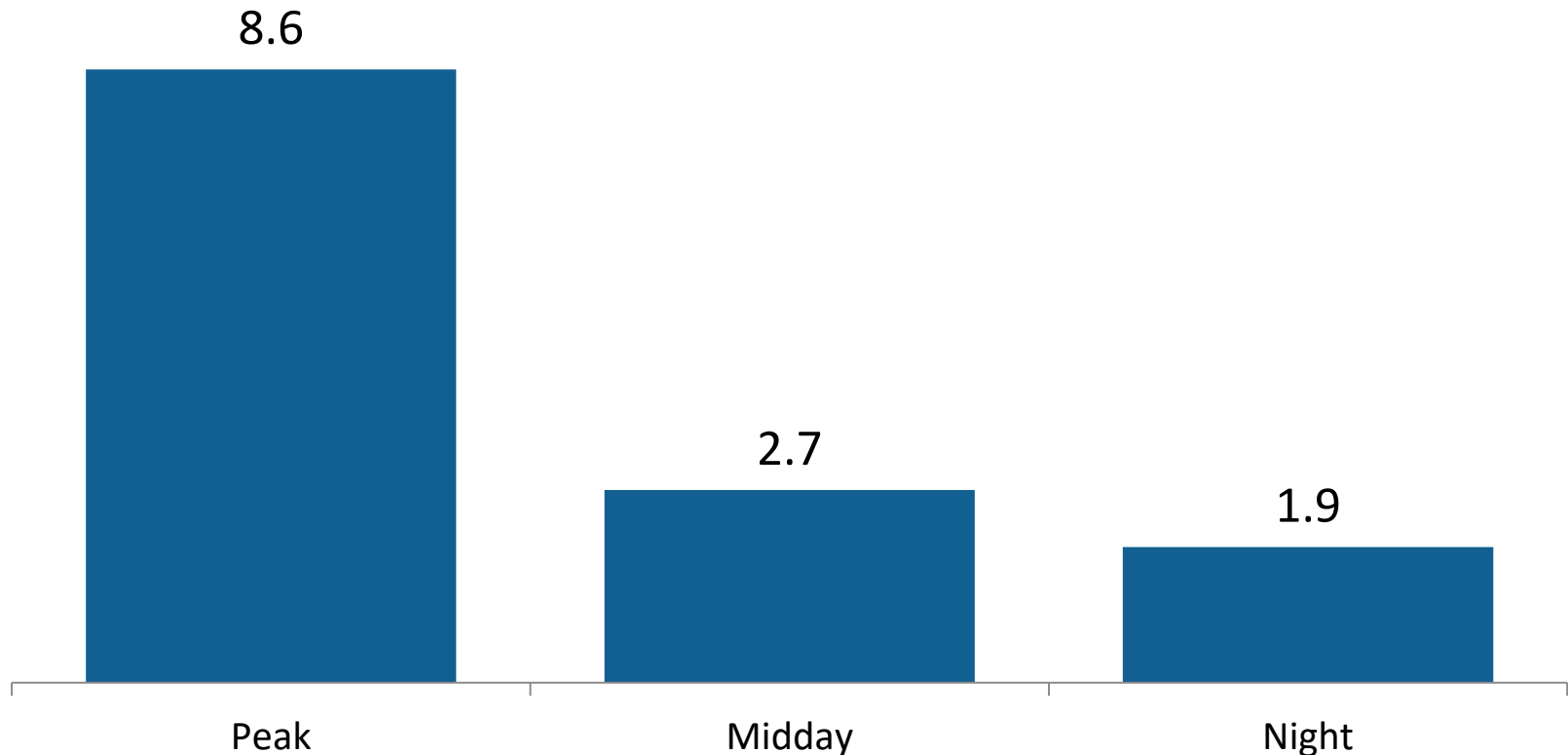
Q10. What ferry routes do you use for moving freight? [MULTI RESPONSE] [IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

Q11. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q10]

Travel Behavior – Detailed



Freight trips are skewed towards peak hours, with few freight trips at night.



Q15. [ASK IF Q5 = 1] In a typical month from October through March, how many of your [INSERT NUMBER FROM Q6] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

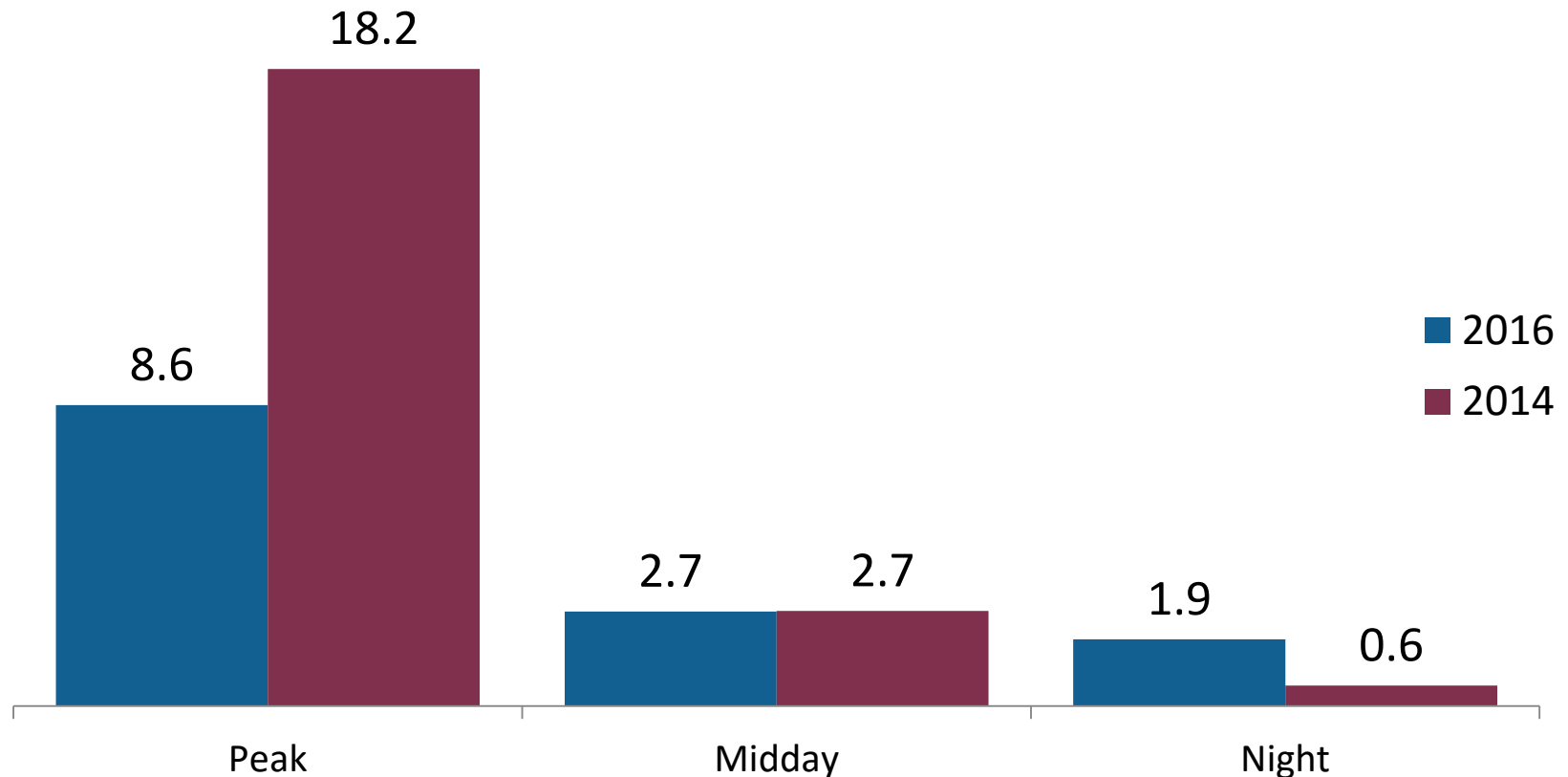
Q16. [ASK IF Q5 = 1] In a typical month from April through September, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Q17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior – Detailed Comparison



Since 2014 there has been a dramatic decline in peak trips.



Q15. [ASK IF Q5 = 1] In a typical month from October through March, how many of your [INSERT NUMBER FROM Q6] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

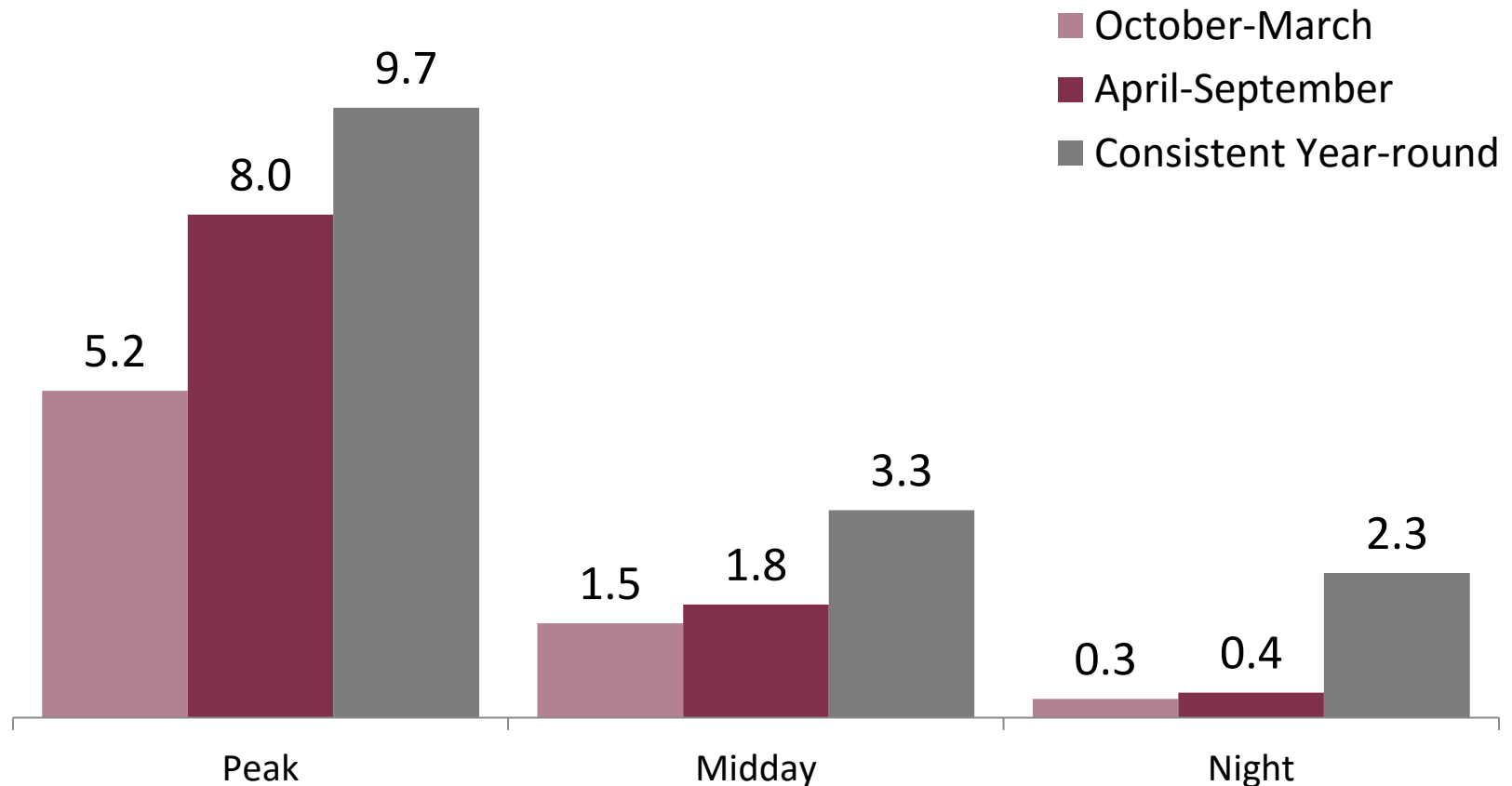
Q16. [ASK IF Q5 = 1] In a typical month from April through September, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Q17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior – Seasonal Comparison



Both companies that vary their trips by season and those whose usage is consistent year-round take the majority of their trips during peak hours.



Q15. [ASK IF Q5 = 1] In a typical month from October through March, how many of your [INSERT NUMBER FROM Q6] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Q16. [ASK IF Q5 = 1] In a typical month from April through September, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

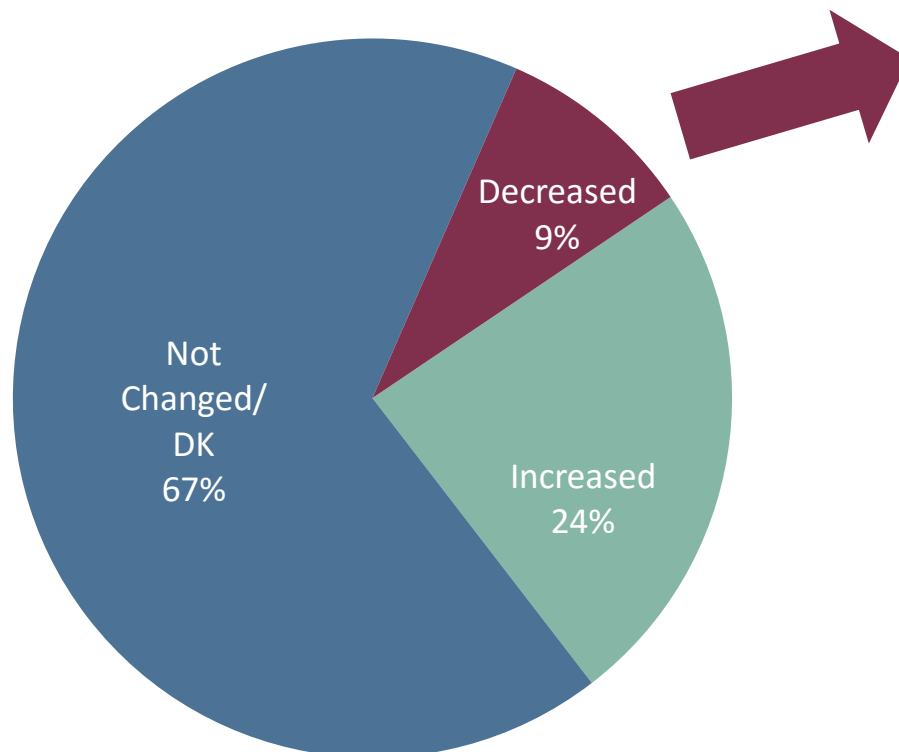
Q17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior



The majority of companies say frequency of ferry use has not changed in 2016, with a quarter (24%) increasing and 9% (n=9) decreasing frequency. Of the 9 companies whose trips decreased, 3 mentioned changes in delivery schedules and 3 mentioned a loss of customers or less work.

2016 Frequency of Ferry Use
(n=100)



Top Reasons for 2016 Decrease (n=9)

Loss of customers/less work (n=3)

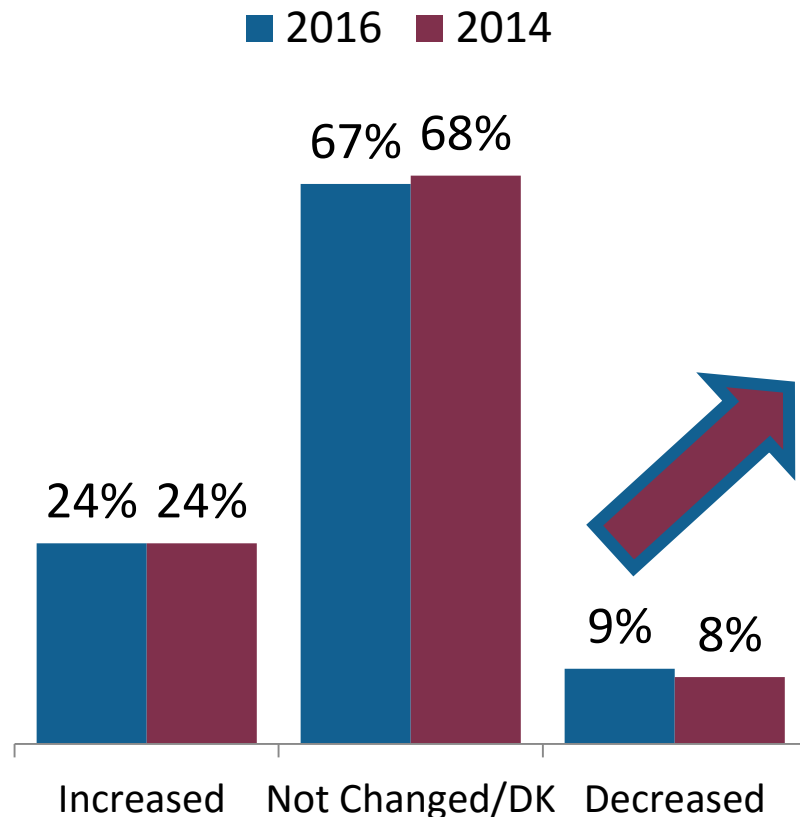
Change in delivery schedule/delivering less often (n=3)

Q49. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?
Q50. What is the primary reason for the decrease?

Travel Behavior – Comparison



Travel behavior has remained consistent from 2014 to 2016.



Top Reasons for Decrease	
2016 (n=9)	2014 (n=8)
Change in delivery schedule/Delivering less often (n=3)	Change in delivery schedule/Delivering less often (n=3)
Loss of customers/Less work (n=3)	Drive around instead of using ferry (n=1)

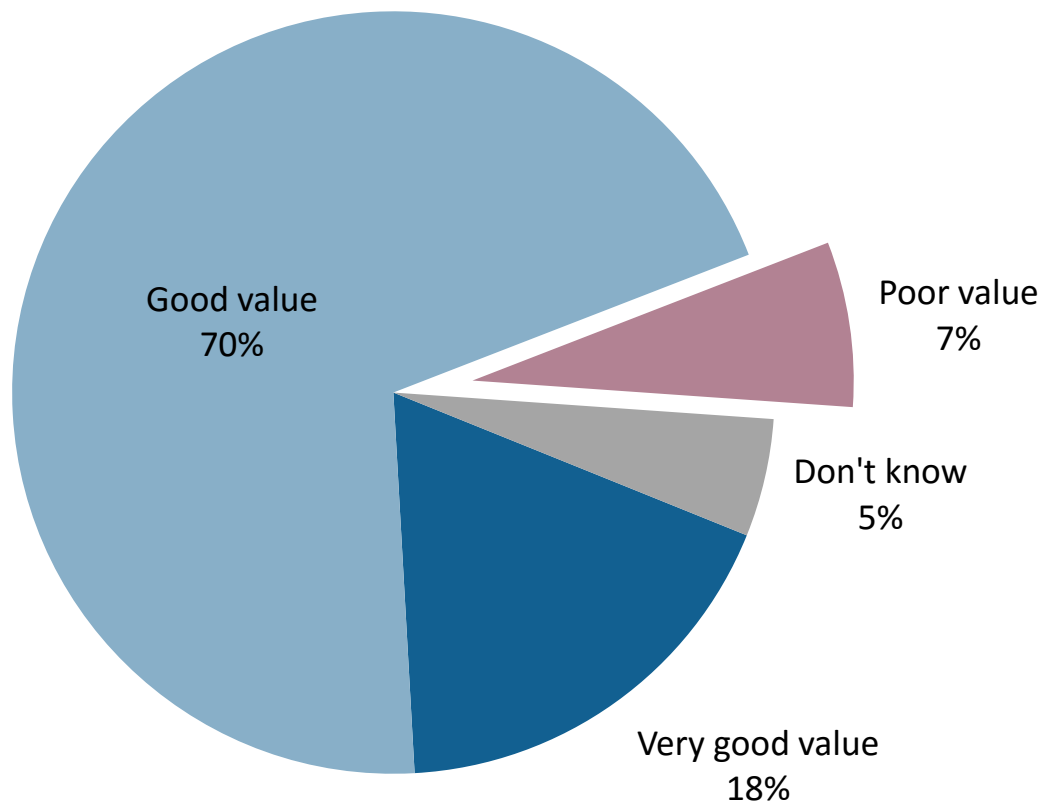
Q49. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?
 Q50. What is the primary reason for the decrease?

Value Perception



Most companies (88%) say Washington State Ferries provide a good value.

Value Perceptions

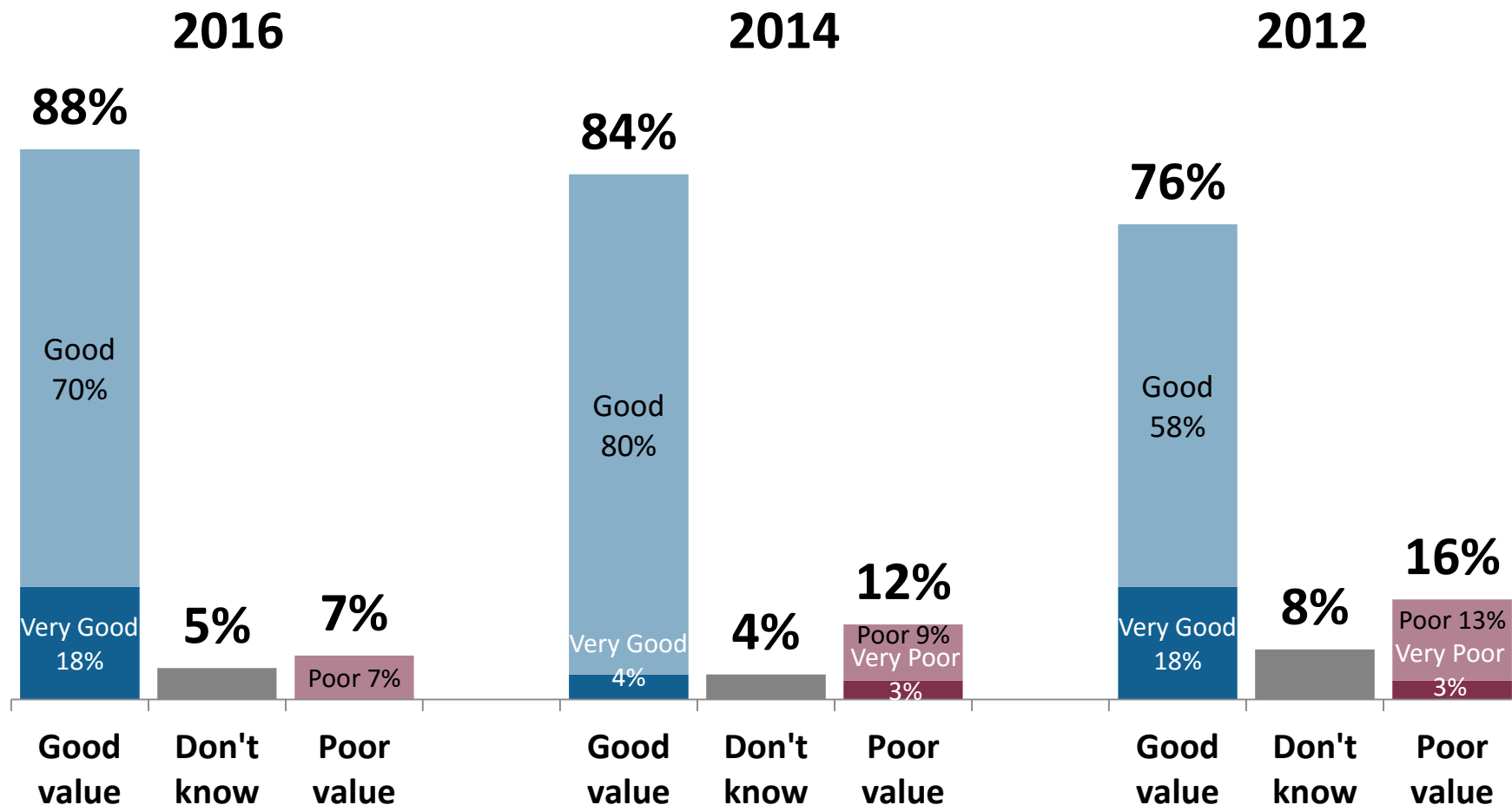


Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries?

Value Perception – Comparison



Overall, the perception of WSF as a good value has steadily increased from 2012 to 2016. In addition, the intensity has recovered from a dip in 2014, as the percentage of companies who find it to be a 'very good value' returns to 2012 levels. No one now finds it to be a 'very poor value.'



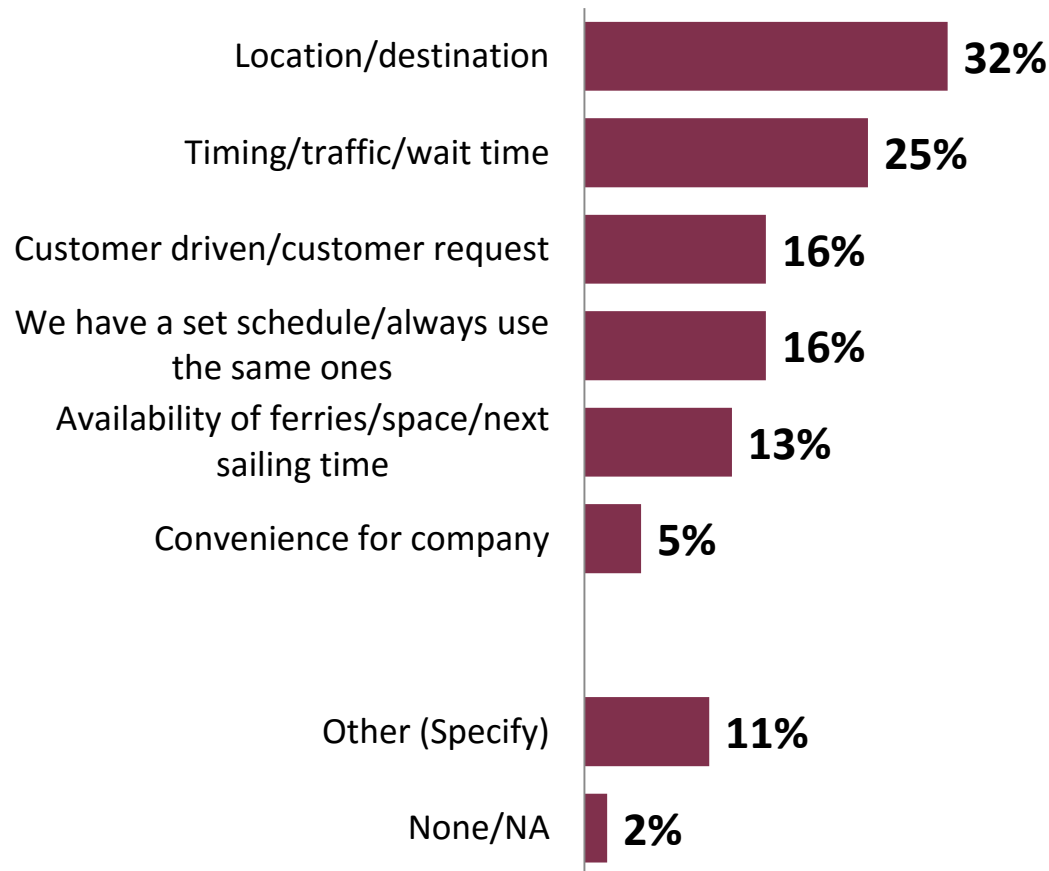
Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

Travel Behavior Influences



Location/destination has the greatest impact on sailing decision closely followed by timing/traffic/wait.

Factors Influencing Decision



Q18. What factors impact your decision most as to which specific ferry sailing to take?



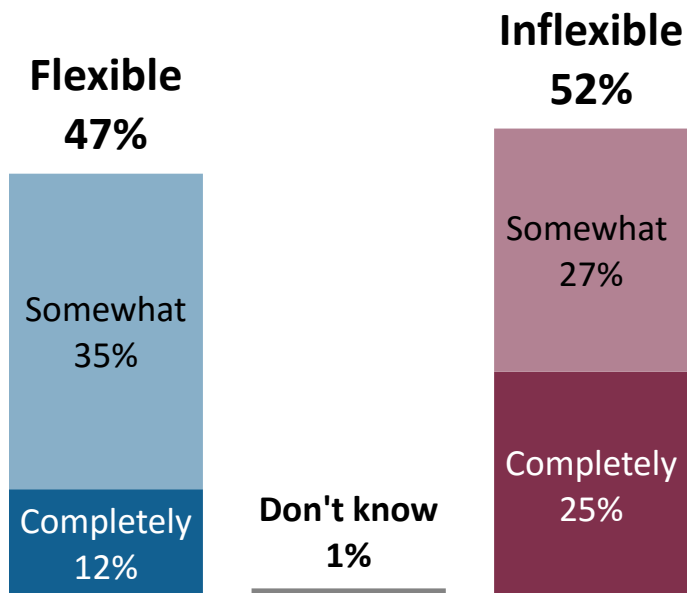
Travel Flexibility

Scheduling Flexibility

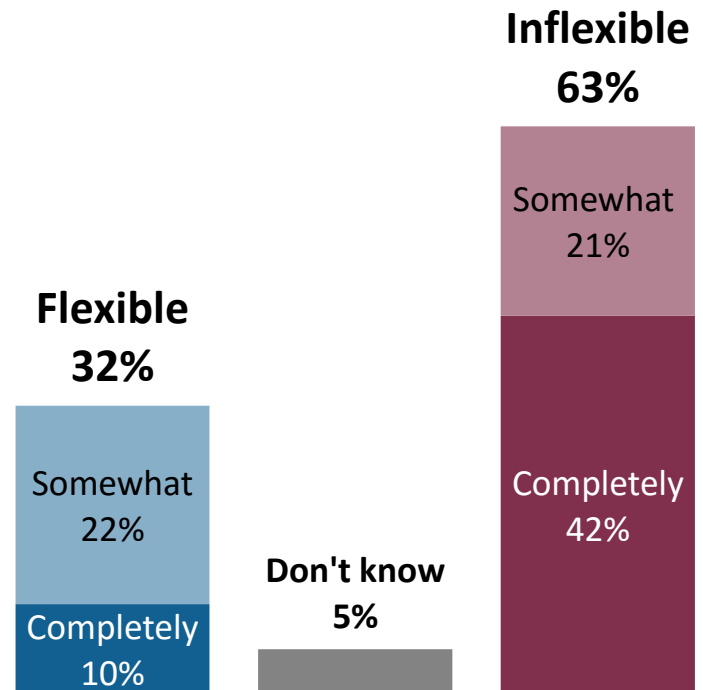


Almost half have at least some flexibility when selecting travel time and 32% have at least some flexibility when selecting travel day.

Time of Day



Day of Week



Q20. What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your drivers? Would you say you are... ?

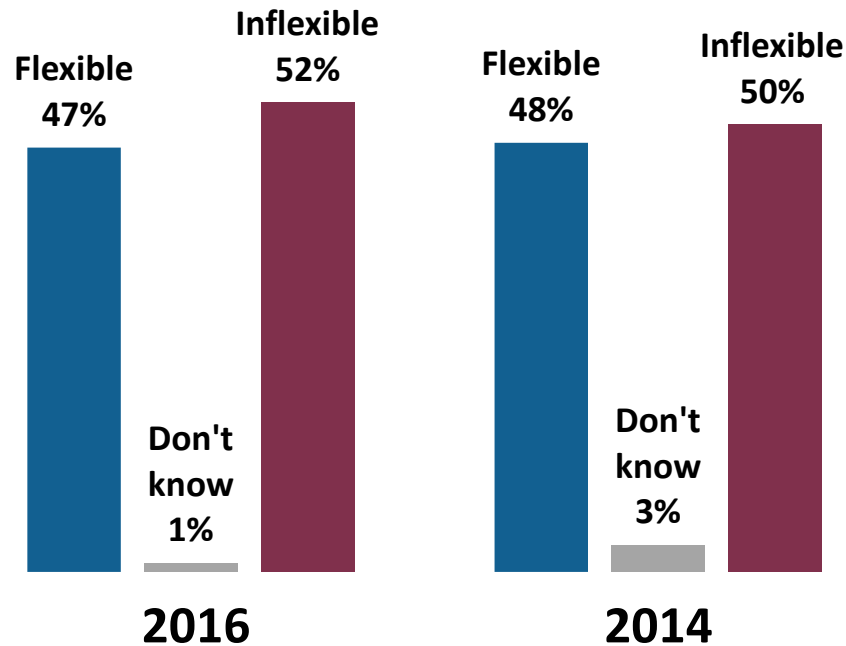
Q21. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?

Scheduling Flexibility – Comparison

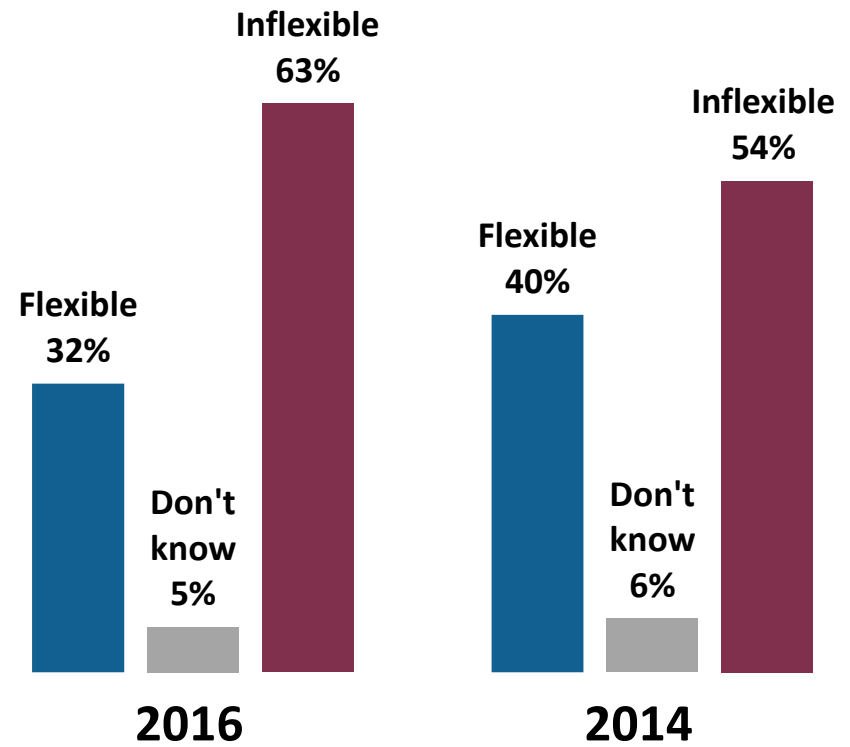


Flexibility in the day of the week that companies can schedule their drivers has decreased significantly from 2014. Forty-two percent of companies are completely inflexible, up from 34% in 2014.

Time of Day



Day of Week



Q20. What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your drivers? Would you say you are... ?

Q21. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?



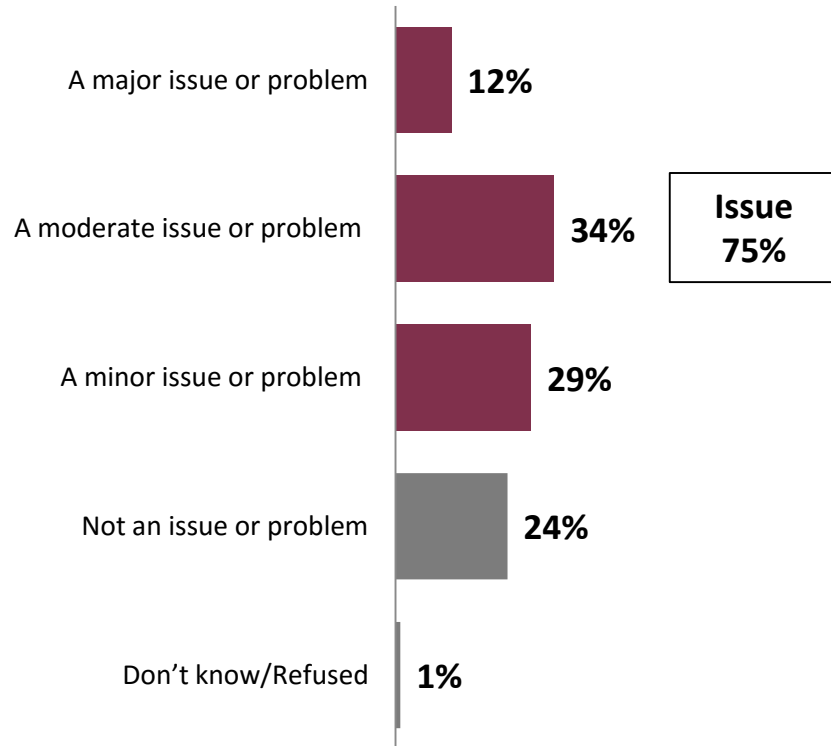
Wait Times

Wait Times



Three quarters (75%) of customers say wait times are at least a minor issue or problem. Anacortes/San Juans has the most mentions of long wait times with an average 1.9 boat wait, although sample sizes are very small.

Impact of Wait Times



Routes	% Experiencing long wait times n=75	Avg no. of Boats to wait through
Anacortes / San Juans	19%	1.9 [n=12]
Edmonds / Kingston	16%	1.1 [n=10]
Mukilteo / Clinton	13%	1.6 [n=9]
Seattle / Bainbridge	11%	1.0 [n=6]
Coupeville / Port Townsend	4%	1.0 [n=3]
Interisland San Juans	3%	1.0 [n=2]
Seattle / Bremerton	1%	1.0 [n=1]
Fauntleroy / Vashon	1%	1.0 [n=1]
Anacortes / Sidney	1%	1.0 [n=1]
All routes	3%	
None	19%	
Don't know	12%	

Q23. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers?

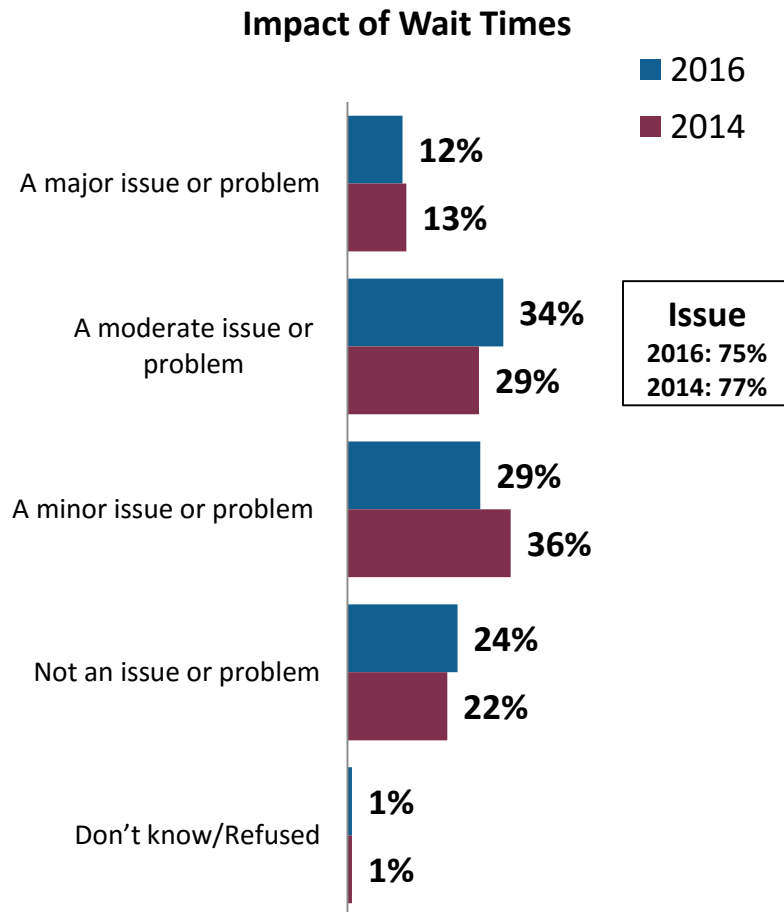
Q24. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

Q25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Wait Times – Comparison



Wait times are less of an issue now than they were in 2014.



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2016 n=75	2014 n=84	2016	2014
Anacortes / San Juans	19%	19%	1.9 [n=12]	2.6 [n=15]
Edmonds / Kingston	16%	8%	1.1 [n=10]	1.8 [n=4]
Mukilteo / Clinton	13%	12%	1.6 [n=9]	1.0 [n=7]
Seattle / Bainbridge	11%	10%	1.0 [n=6]	1.0 [n=6]
Coupeville / Port Townsend	4%	4%	1.0 [n=3]	1.5 [n=2]
Interisland San Juans	3%	4%	1.0 [n=2]	0.7 [n=3]
Seattle / Bremerton	1%	5%	1.0 [n=1]	1.3 [n=3]
Fauntleroy / Vashon	1%	5%	1.0 [n=1]	0.5 [n=2]
Anacortes / Sidney	1%	--	1.0 [n=1]	--
All routes	3%	3%	--	--
None	19%	17%	--	--
Don't know	12%	19%	--	--

Q23. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers?

Q24. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

Q25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.



Reservations

Reservations – Awareness



Most companies (94%) have a business account with WSF. However, 17% are not aware of WSF's vehicle reservation system in 2016.

Have a Business Account



Aware of Reservation System

Yes, aware of reservation system

83%

No, not aware

17%

Q27. Do you have a business account with Washington State Ferries?

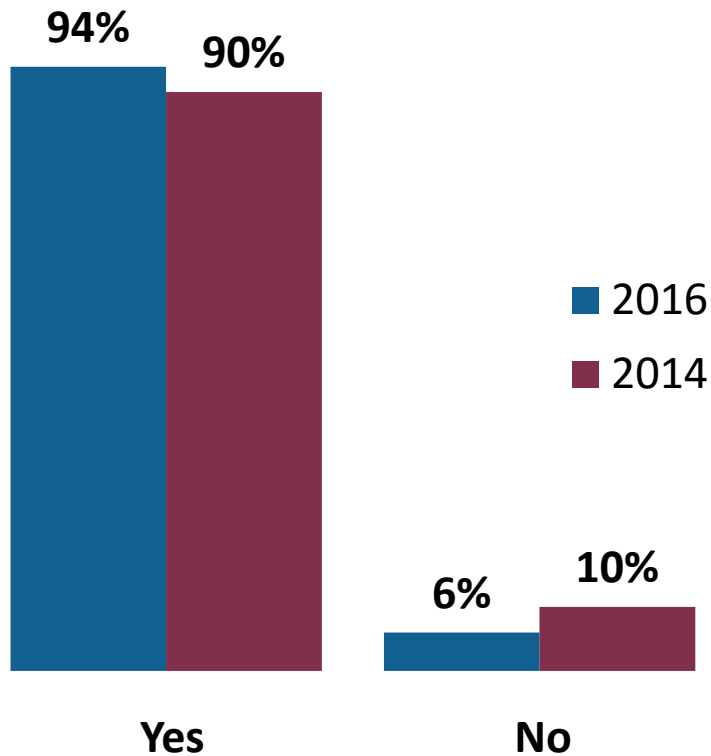
Q28. Are you aware Washington State Ferries offers a vehicle reservation system?

Reservations – Awareness Comparison

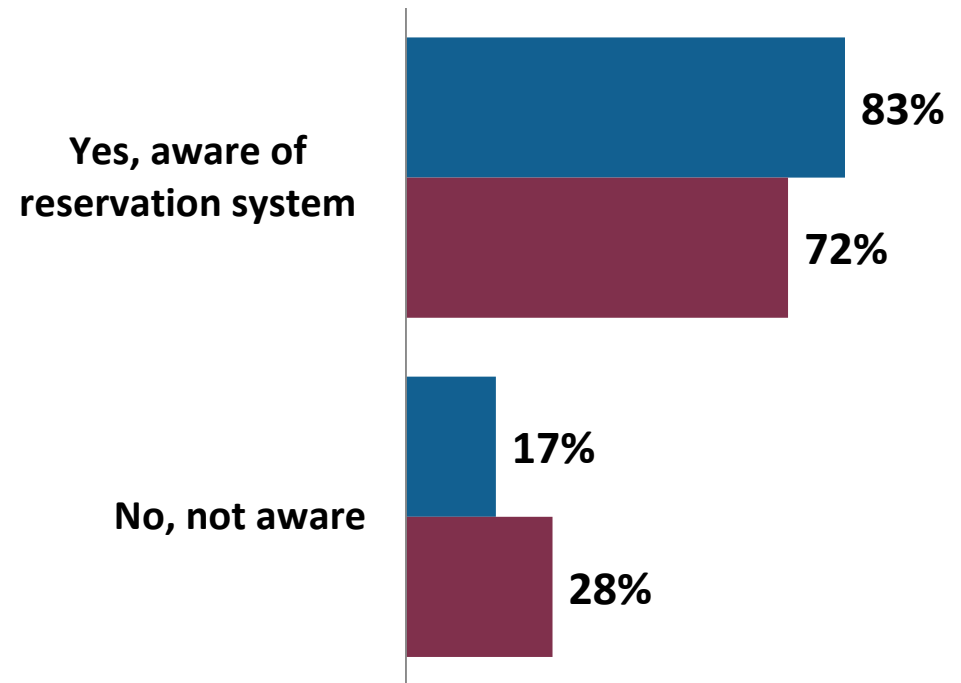


Slightly more respondents have a business account compared to 2014. General awareness of the reservation system has increased as well.

Have a Business Account



Aware of Reservation System



Q27. Do you have a business account with Washington State Ferries?

Q28. Are you aware Washington State Ferries offers a commercial vehicle reservation system?

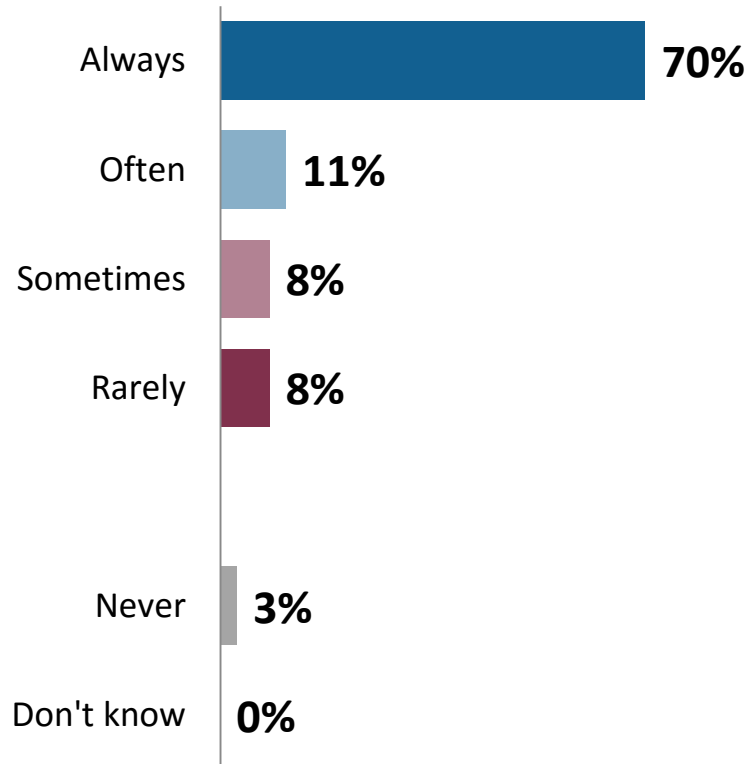
Reservations – Usage/Satisfaction



Of those customers who use the Coupeville/Port Townsend or Anacortes routes (n=37), the majority use the reservation system always (70%) or often (11%). Only 3% never use the system. Of those customers who use the reservation system (n=36), most (89%) say they are satisfied.

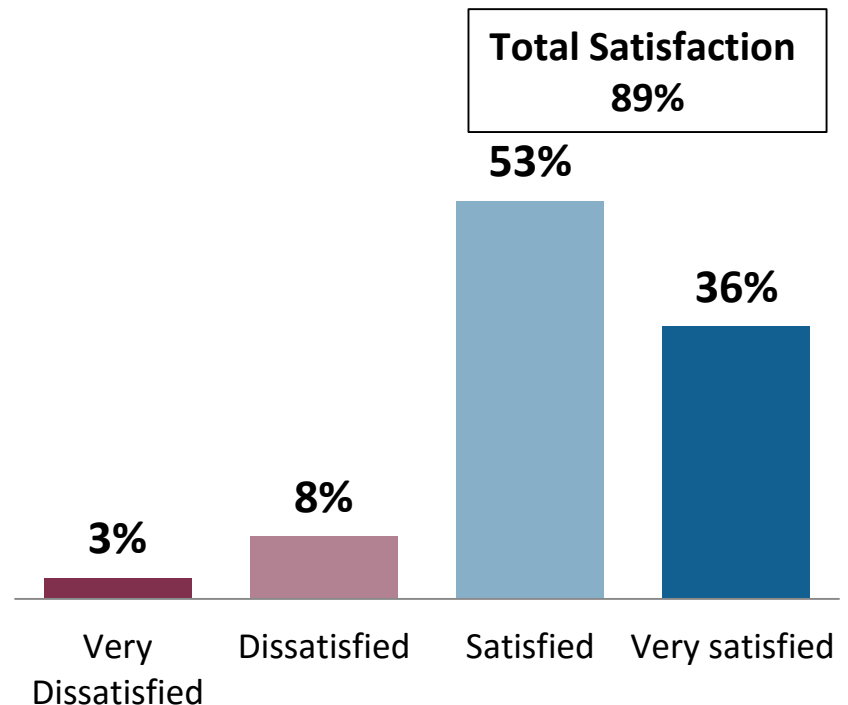
Reservation System Use

(n=37)



Satisfaction with Reservation System

(n=36)



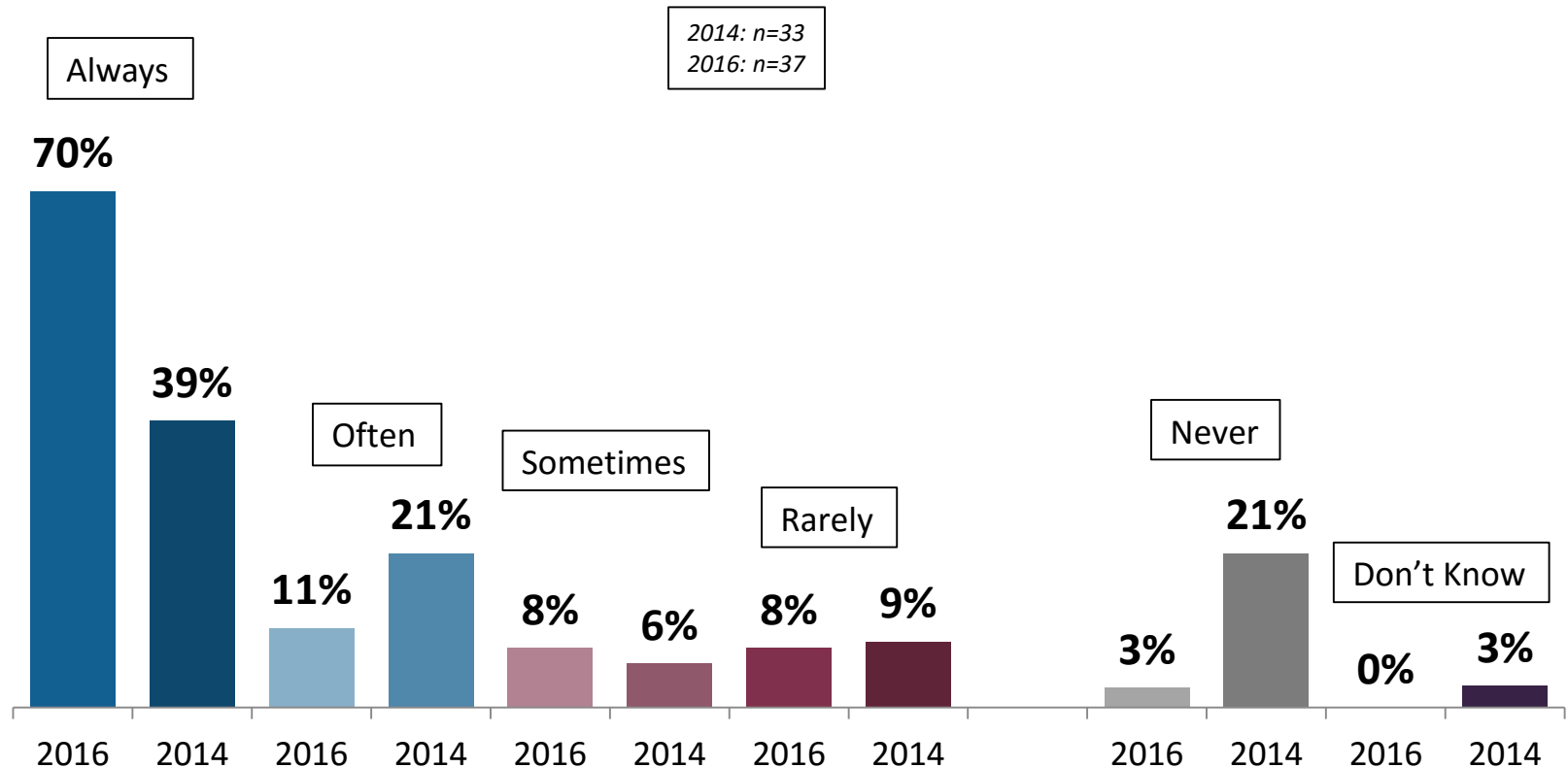
Q29. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's vehicle reservation system?

Q30. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?

Reservations – Usage Comparison



*The Coupeville/Port Townsend and Anacortes reservation system has become more popular in the last two years, with the percentage of people who never use it dropping from 21% to 3%. Additionally, the percentage of people who always use it has risen by 31%.**



**This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.*

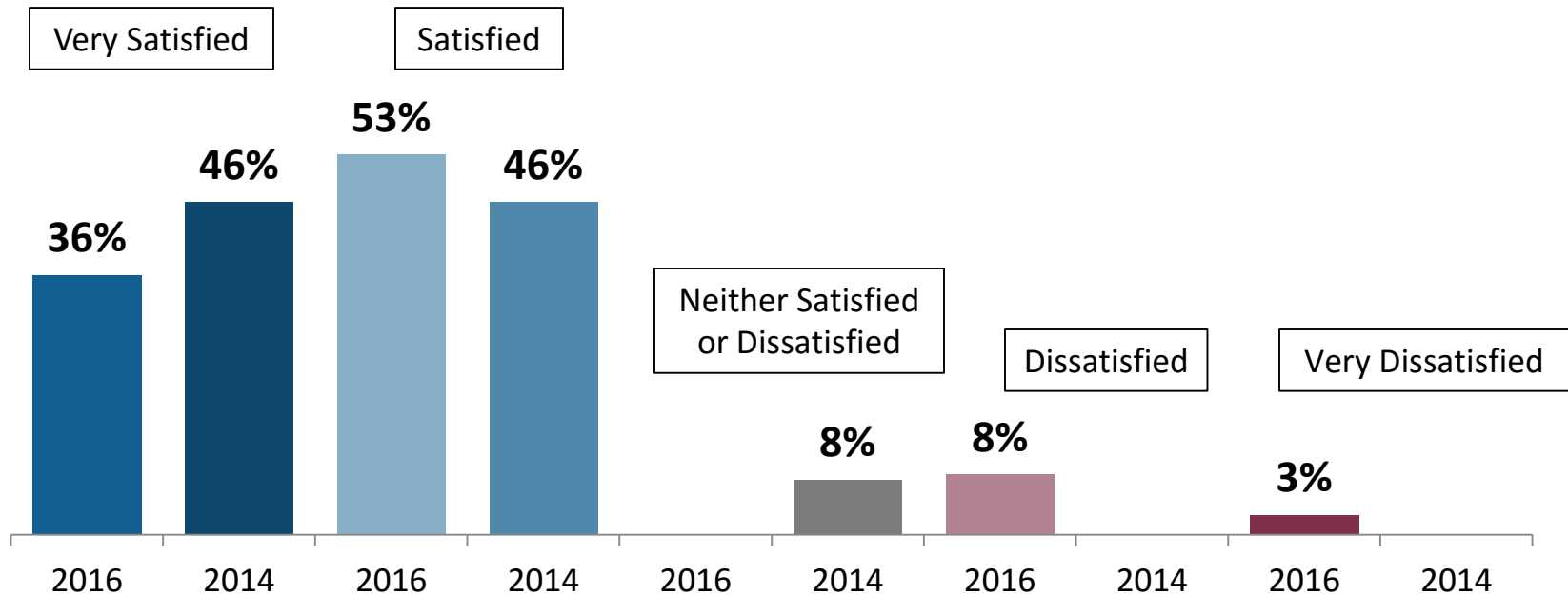
Q29. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's vehicle reservation system? Would you say... ?

Reservations – Satisfaction Comparison



Overall satisfaction has decreased slightly from 2014, but the total number of companies using the system has also increased.

2014: n=26
2016: n=36



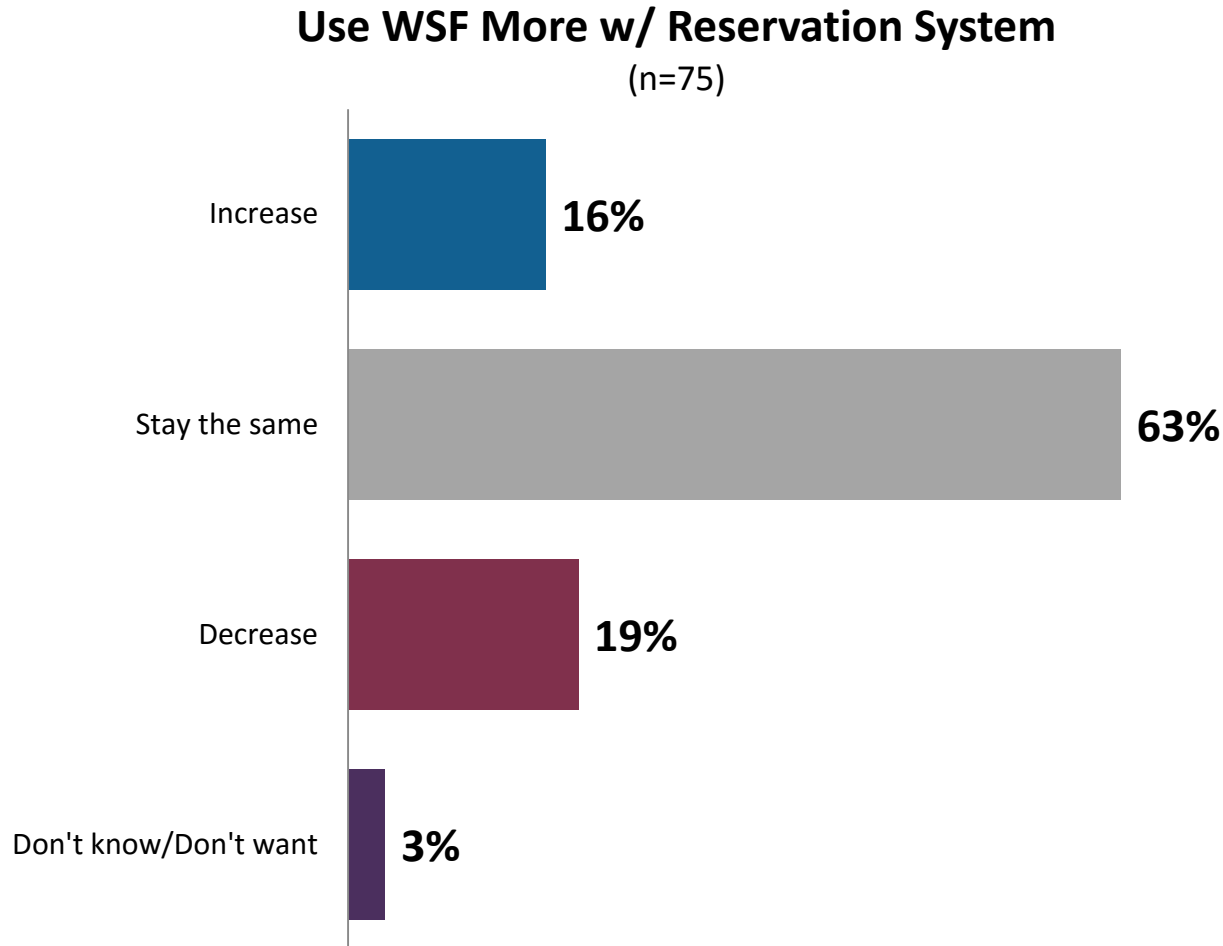
*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.

Q30. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?

Reservations – Central Puget Sound



Of those customers who use Central Puget Sound ferry routes (n=75), two thirds (63%) would not change their ferry usage given a reservation system, and only 16% would increase usage.



Q32. If all of the Central Puget Sound ferry routes had a reservation system, would your companies usage increase, decrease or remain the same?

Introduction to Reservation System

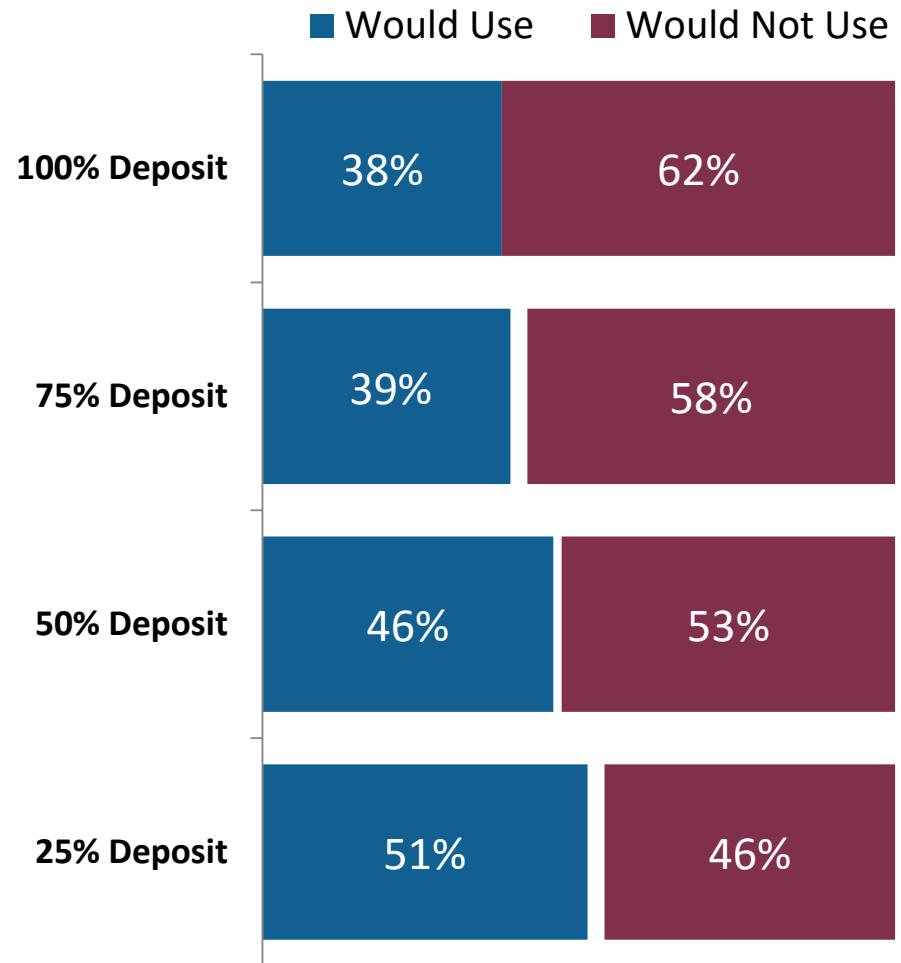


Of those who would be open to a vehicle reservation system for Central Puget Sound routes (n=74), over half (51%) say they would be likely to use the system as described with a 25% deposit.

The current WSF vehicle reservation system has the following features:

- *Space is available for reservations up to two months ahead of the season schedule start date;*
- *No reservation deposit is necessary at the time the reservation is made;*
- *A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day;*
- *Reservations may be cancelled and/or changed once up to 5 pm of the prior day with no penalty;*
- *If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and*
- *The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.*

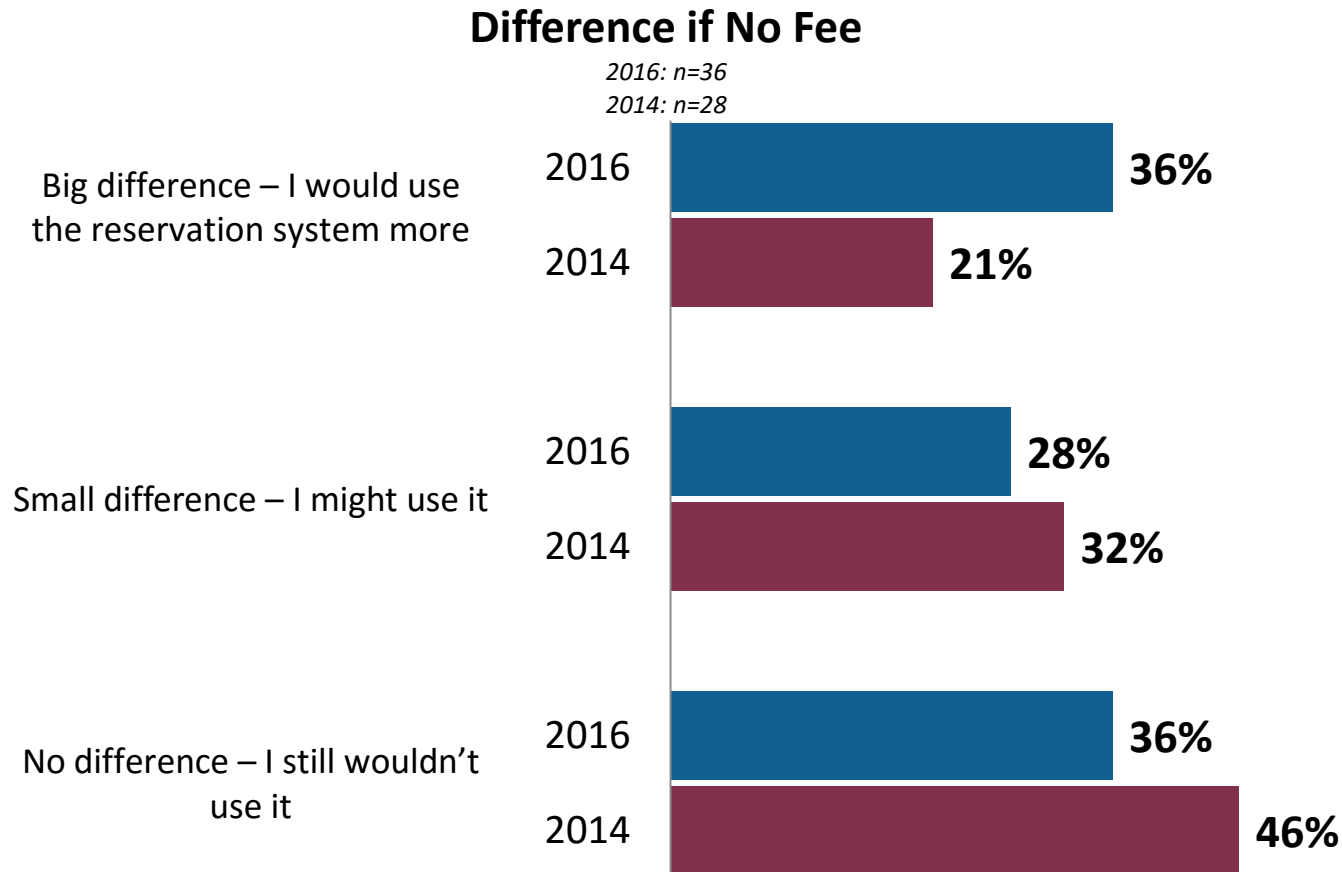
Q33-36. How likely would your company be to use this vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say... ?



Reservations – No-Show Fee Comparison



Almost two-thirds (64%) say not charging a no-show fee would make some difference in their likelihood to use the system. This is an increase from 2014 where a little over half (54%) said it would make a difference.



Q38. How much of a difference would it make in your use of a vehicle reservation system if WSF didn't charge the no show fee if you ended up traveling from that terminal on a different sailing anytime that same day? Would you say that would make a... ?

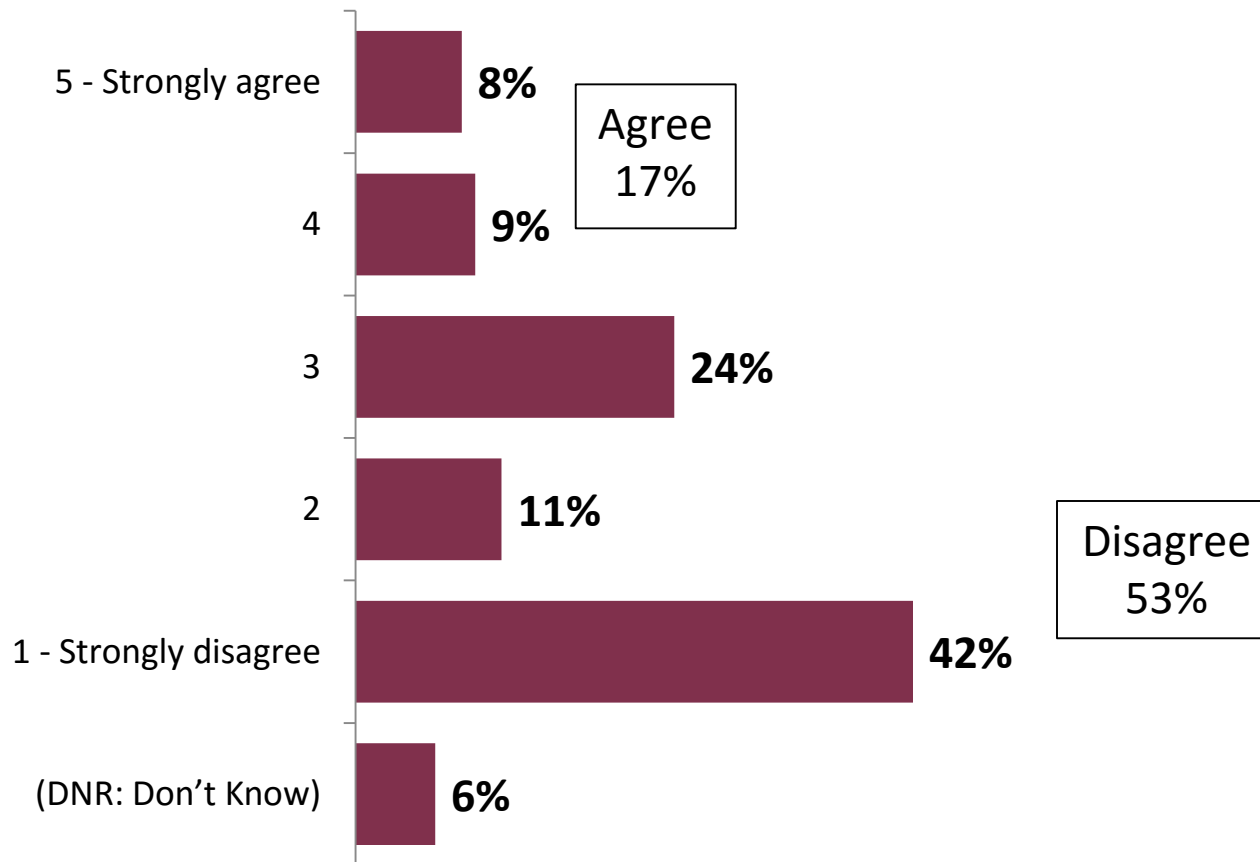


Potential Congestion Pricing

Congestion Pricing



By a 53% to 17% margin, freight shippers disagree that they should be charged a premium over regular freight fares if they travel during peak periods – even when coupled with a discount for non-peak travel.

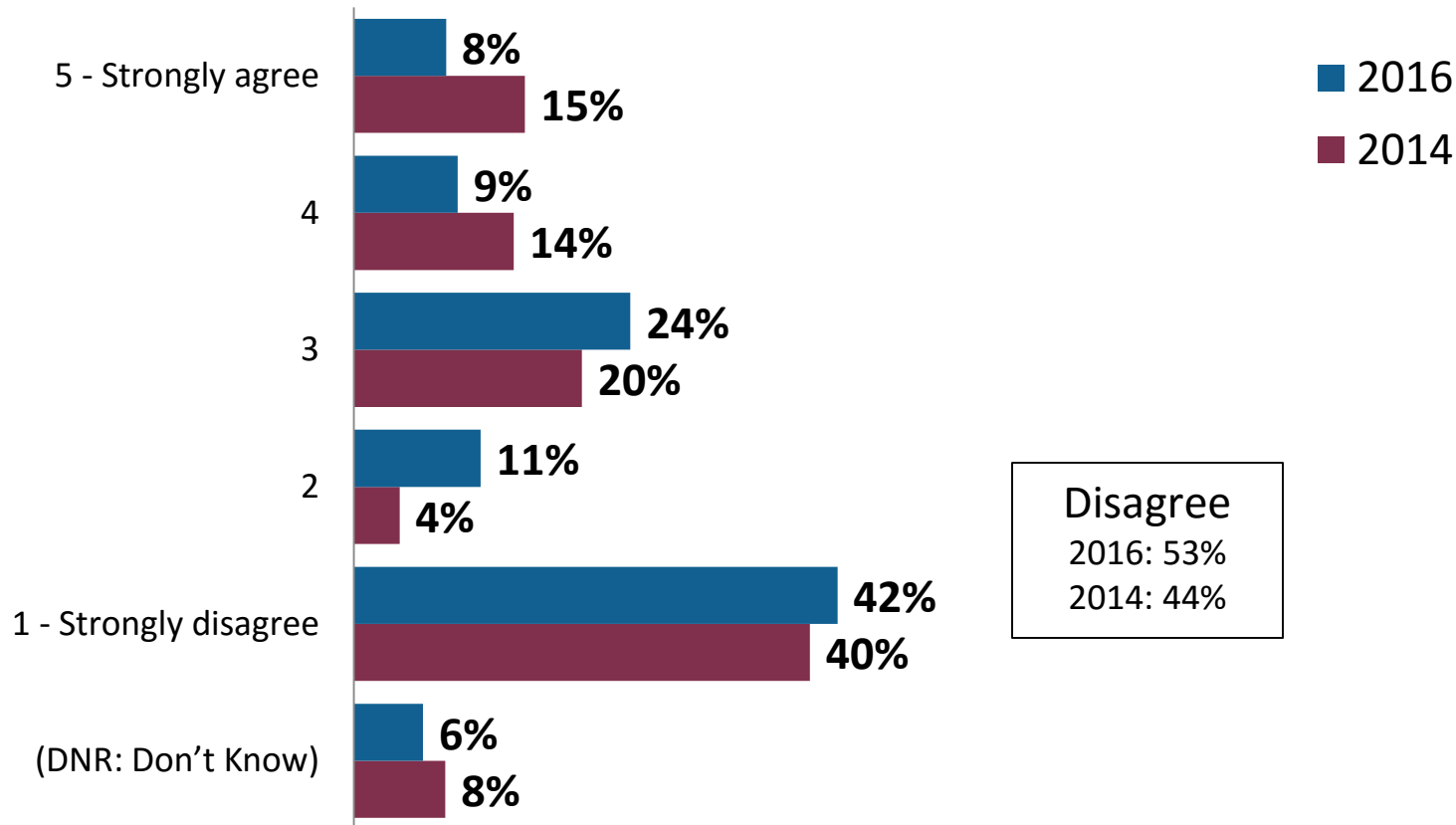


Q40. Using a 5-point scale where 1 means "strongly disagree" and 5 means "strongly agree," to what extent do you agree or disagree with the following statement? *In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount from regular freight fares if they travel during off-peak periods.*

Congestion Pricing – Comparison



Overall, freight shippers are more opposed to the idea of congestion pricing than in 2014 (53% vs. 44%).



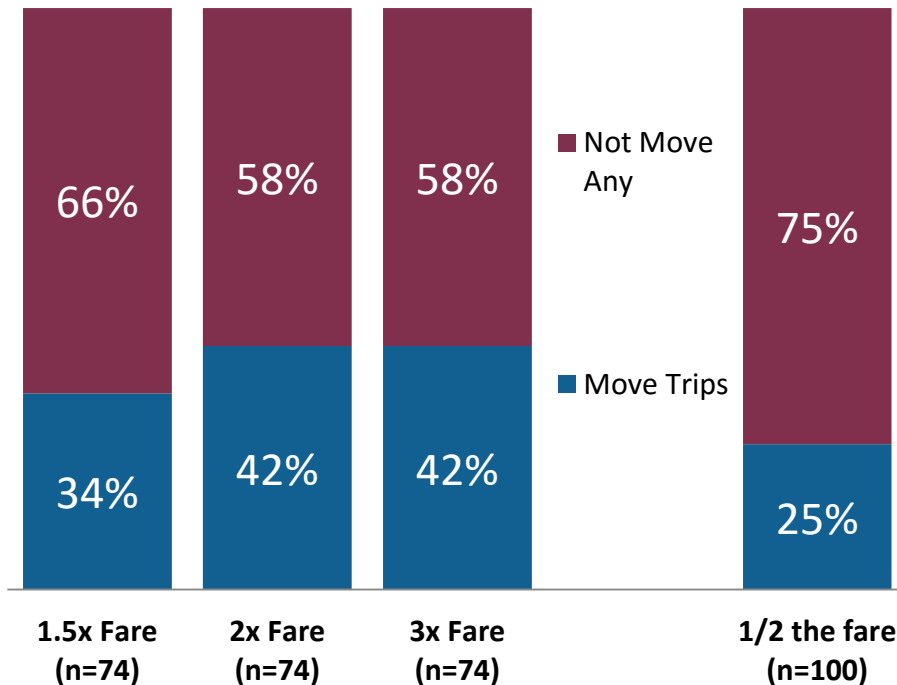
Q40. Using a 5-point scale where 1 means "strongly disagree" and 5 means "strongly agree," to what extent do you agree or disagree with the following statement? *In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount from regular freight fares if they travel during off-peak periods.*

Congestion Pricing



About four-in-ten freight customers who travel in peak times (n=74) say they would move trips to off-peak times if they were charged between 1.5 and 3 times the current freight vehicle fare. A quarter of all customers say they would move trips to overnight if fares were cut in half for that time period. Those who would not move because of cheaper fares (n=60) say they lack the flexibility to change the time.

Would Move Trips to Off Peak



Reasons to continue even w/higher fares	%
Don't have a choice/we go by a schedule/work hours	77%
Customer needs/demands	10%
Other	17%
Don't know	3%

Q41-43. If freight customers who use the ferry during peak travel periods were charged one and a half times/double/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

Q44. If freight customers on overnight sailings between 9pm and 5am each day were charged just half of the fare currently charged for freight vehicles, what percent of your freight trips would you schedule for the 9pm and 5am time period?

Q45. If the ferry system were to offer half-price fares for trucks between 9pm and 5am, what reasons might you have to continue using the ferries during the peak periods at those higher fares? (Multi-response)

Congestion Pricing – Comparison

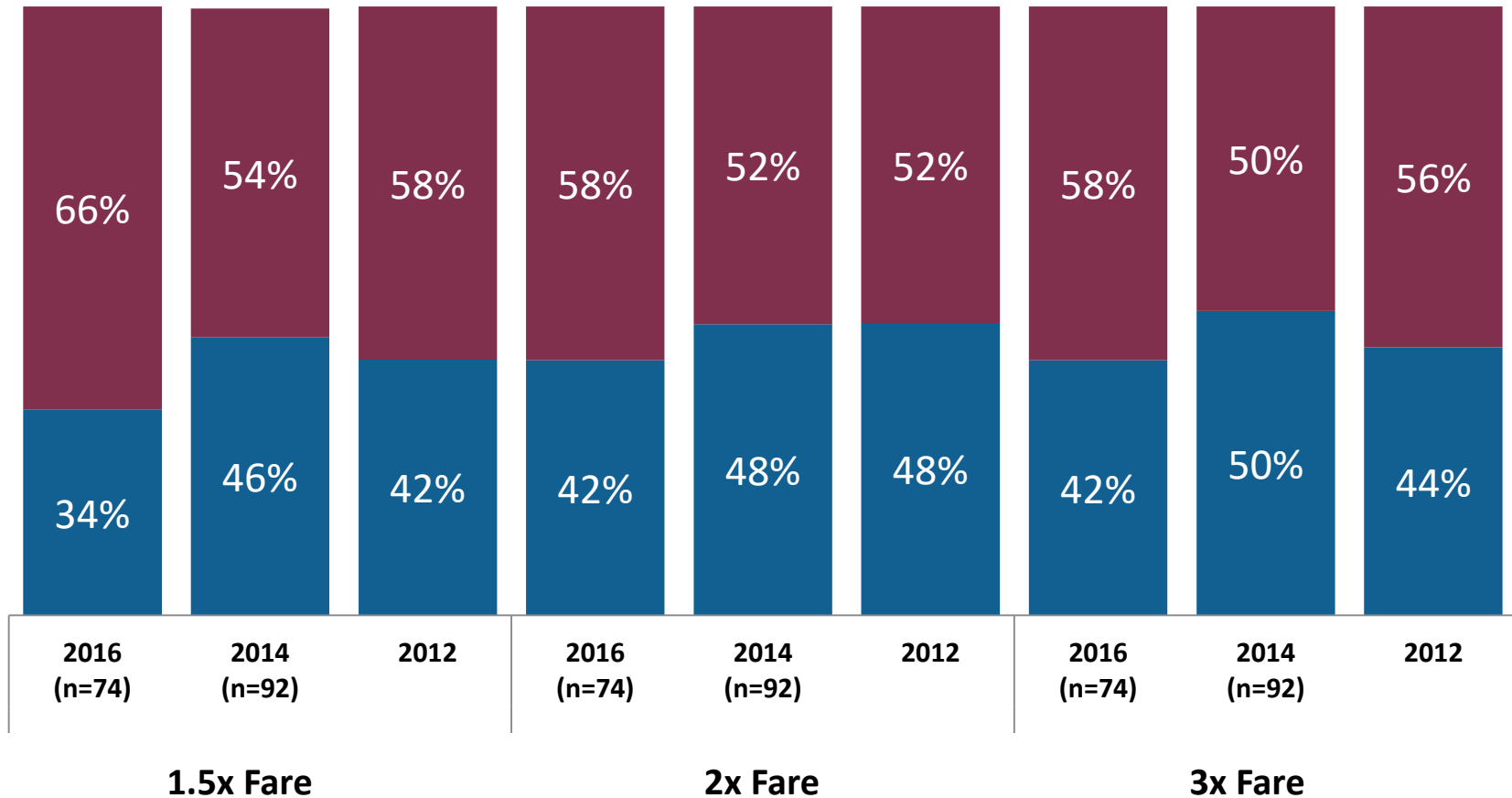


The likelihood of moving trips has decreased slightly since 2014.

Would Move Trips to Off Peak Times

■ Not Move Any

■ Move Trips

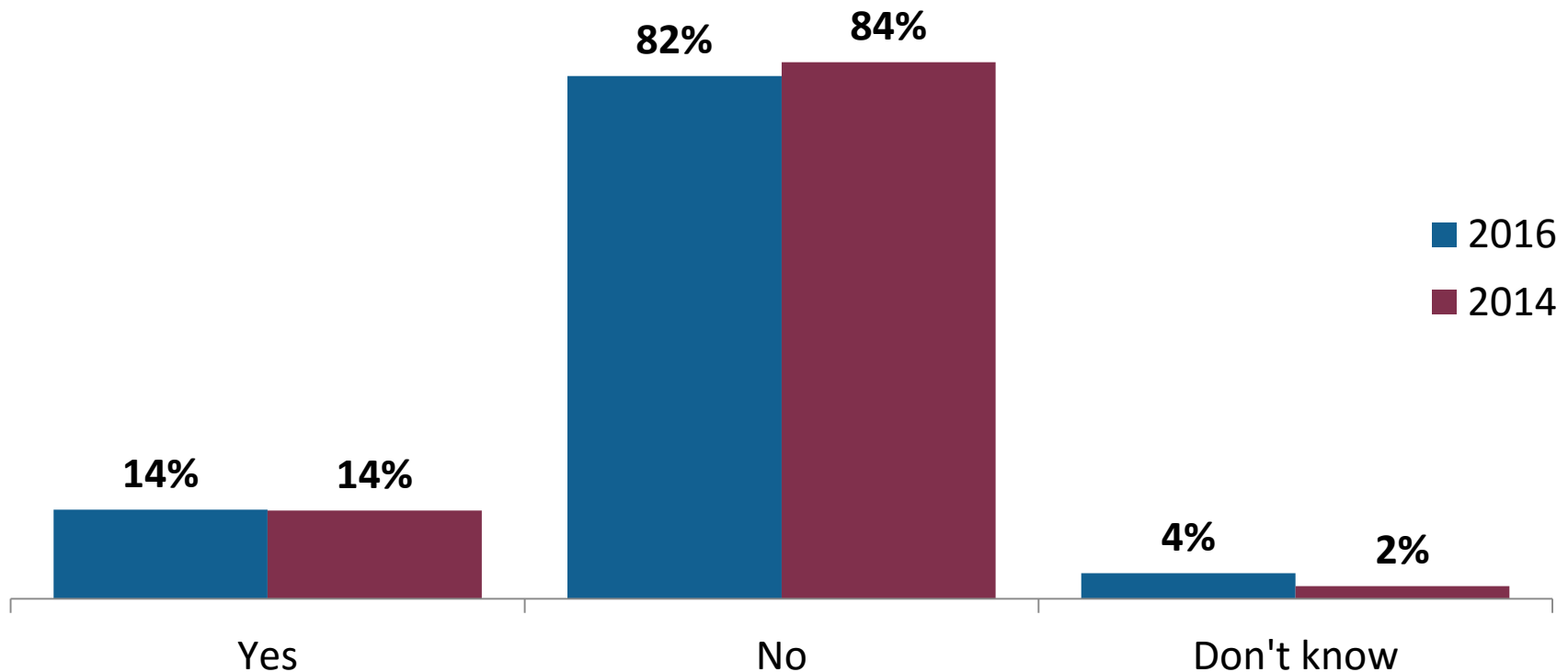


Q41-43. If freight customers who use the ferry during peak travel periods were charged one and a half times/double/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

Congestion Pricing – Free Secure Parking



Consistent with the 2014 respondents, most freight customers say a secure parking area on the arrival side would not make them more likely to schedule ½-priced late-night ferry sailings.

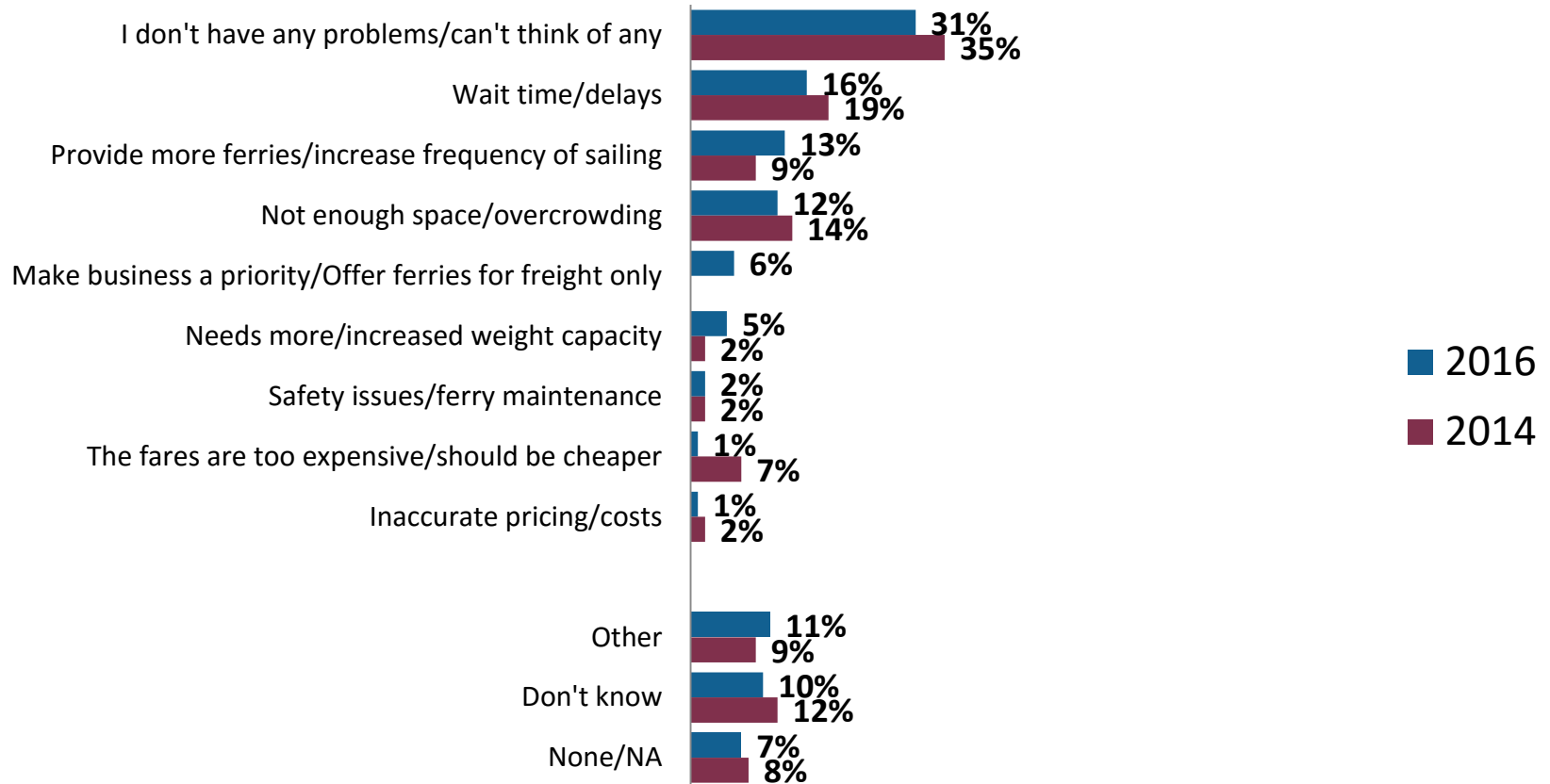


Q46. Would a free secure parking area on the arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?

Issues Facing WSF



Forty-eight percent (I don't have any problems, 31%; Don't Know, 10%; None, 7%) do not mention any specific problem with freight shipping on Washington State Ferries. This has fallen from 55% (I don't have any problems, 35%; Don't Know, 12%; None, 8%) since 2014. Among those that do mention an issue, the top concerns center around wait times and space.



Q48. What do you feel are the primary problems or issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better?



Appendix

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
NW REGION EQUIPMENT	1500	<1%
L T I INC	300	1%
NESS & CAMPBELL CRANE INC.	250	20%
SCHOOL DIST #411 ISSAQUAH	100	10%
WASHINGTON TRUCKING INC	79	10%
WSP - FOB - BELLEVUE DISTRICT	75	1%
ACE HARDWARE RETAIL SUPPORT CTR	60	42%
DIETRICH TRUCKING LLC	58	9%
NORTHWEST ASPHALT INC	50	20%
DUNN LUMBER CO INC	40	88%
NELSON TRUCKING CO INC	40	8%
SCHOOL DIST #306 LAKEWOOD	31	6%
STATE ROOFING INC	30	100%
LENZ ENTERPRISES INC.	30	27%
LOOMIS	30	3%
PACIFIC SEA FOOD CO	28	7%
BERT MATTER INC	27	15%
AERONAUTICAL SERVICES INC	27	15%
UNITED NATURAL FOODS WEST INC	26	100%
AMERICAN BLDG & ROOFING INC	25	24%
POZZI BROS TRANSPORTATION INC	23	4%
HUTTIG BUILDING PRODUCTS	21	10%
SCHWANS HOME SERVICE	21	5%
QUALITY TOWING INC	20	100%
SHRED-IT OF WESTERN WASHINGTON	20	10%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
PARRISH TRUCKING INC	19	26%
R L & J VENTURES	16	100%
DRYWALL DISTRIBUTORS INC	16	63%
DICKERSON DISTRIBUTORS INC	16	19%
PETE'S MILK DELIVERY	16	6%
REDDAWAY	16	6%
FIRST CALL PLUS OF WA LLC	15	100%
SAWDUST SUPPLY CO INC	15	20%
PACIFIC PARTY CANOPIES	14	100%
TRI-COUNTY TRUSS INC	14	14%
FALCON CORP	13	100%
CUZ CONCRETE PRODUCTS INC	13	38%
BOISE BUILDING SOLUTIONS DISTRIBUTION LL	13	23%
O'BRIEN CONSTRUCTION INC	12	67%
INTERNATIONAL WOOD PRODUCTS LLC	12	25%
SAN JUAN COUNTY ROAD DEPT	12	17%
FISHERIES SUPPLY CO	12	17%
COASTWIDE LABORATORIES	12	17%
NORTH COAST ELECTRIC CO	12	8%
WS PARKS & RECREATION- NW REG HQ	11	9%
SOUND PUBLISHING INC	10	100%
YOUNG & SON WHOLESALE DIST LTD	10	60%
RELIABLE FLOOR COVERINGS	9	67%
ASSOCIATED BOAT TRANSPORT INC	9	33%
N W SAND & GRAVEL PRODUCTS INC	9	22%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
JANES GYPSUM FLOORS INC	9	22%
SCHWAN'S HOME SERVICE - MUKILTEO	9	11%
CEDAR KING LUMBER CO INC	8	100%
PACIFIC LOGGING INC	8	100%
BONNEVILLE POWER ADMIN	8	13%
STIEBRS FARMS INC	8	13%
A B C SUPPLY CO INC	7	100%
WASHINGTON MARINE CLEANING LLC	7	100%
ISLAND ICE (HEURISTIC ENTERPRISE)	7	57%
LOPEZ READY MIX INC	7	43%
JELD WEN WINDOWS & DOORS	7	43%
THE CHEESEMAN CORP	7	29%
AIRGAS DRY ICE	7	29%
A B C SUPPLY CO INC	7	14%
SHAWN'S QUALITY PRODUCE	7	14%
TIM RYAN CONSTRUCTION INC	6	100%
HANSON BUILDING SUPPLY	6	33%
PACIFIC FOOD IMPORTERS INC	6	33%
THE EVERETT STEEL COMPANIES	6	33%
THE JANES COMPANY INC	5	100%
CRDN OF SEATTLE AND WESTERN WA	5	100%
NICKEL BROS HOUSE MOVING USA	5	100%
KEY CITY FISH COMPANY	5	100%
LOGGERS & CONTRACTORS SUPPLY	5	40%
PURATOS BAKERY SUPPLY	5	40%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
SKYLINE FLOWER GROWERS/SEATTLE	5	40%
INDEPENDENT PET SUPPLY	5	40%
CATTLE POINT ROCK & TOPSOIL LLC	5	20%
SUBURBAN PROPANE LP	4	100%
CASCASDE PACIFIC FLOORING DIST	4	100%
OLYMPIC GLASS & DOOR	3	100%
STORER ENTERPRISES INC DBA AIRPORT & BUR	3	100%
WASHINGTON CULVERT CO	3	100%
BUILDING SPECIALTIES	3	100%
J L BROOKS WELDING INC	3	67%
DIESEL AMERICA WEST	3	67%
KENCO LOGISTIC SERVICES INC	3	67%
ANACORTES LES SCHWAB	3	33%
OLYMPIC DISTRIBUTING CO	3	33%
TIMBERLAND HOMES INC	2	100%
WOODTONE BUILDING PRODUCTS	2	50%
BELCO FOREST PRODUCTS	1	100%
SYNGENTA SEEDS INC	1	100%
STORYVILLE COFFEE CO LLC	1	100%
BUILDING SOURCE INC	1	100%
ISLAND SPRING INC	1	100%
AMERICAN RED CROSS	1	100%
ISLAND CO SENIOR CENTER	1	100%
KIMCO PLUMBING INC	1	100%
ISLAND HARDWARE & SUPPLY	1	100%

*Companies in **bold** responded to the survey in 2014 as well

Survey Questionnaire



Washington State Transportation Commission
Telephone Survey of Freight Shippers - 2016
EMC Research #16-6025

n=100

FINAL

[IF NAME AVAILABLE: May I please speak to (NAME ON LIST)?] Hello, my name is _____, I'm calling on behalf of the Washington State Transportation Commission. We are conducting a brief research study about freight trips on Washington State ferries.

SCREENING:

- 1.a [IF NO NAME:] May I please speak to the person in your company who is responsible for scheduling freight trips on Washington State Ferries?
1. Yes → Continue
 2. No → *Schedule call back if not available.*
 3. Do not use Ferries for freight → **GO TO Q96 BEFORE TERMINATING**
 4. No trucks/No freight → **THANK AND TERMINATE SURVEY**
- 1.b [IF NAME AVAILABLE:] Are you the person in your company who is responsible for scheduling freight trips on Washington State Ferries?
1. Yes → Continue
 2. Not right person → May I please speak to the person in your firm whose job responsibility entails some or all scheduling freight truck trips on ferries? *Schedule call back if not available.*
 3. Do not use Ferries for freight → **GO TO Q96 BEFORE TERMINATING**
 4. No trucks/No freight → **THANK AND TERMINATE SURVEY**
2. Approximately how many trucks are in your fleet in total? An estimate is fine. [RECORD NUMBER: _____]
1. NONE/DON'T HAVE OWN FLEET → **THANK AND TERMINATE SURVEY**
 97. (DNR: Don't know → **CONTINUE TO Q3**
3. And how many of those trucks use Washington State Ferries? Again an estimate is fine. [RECORD NUMBER: ____]
96. (DNR: We do NOT use WSF → **SKIP TO Q96 BEFORE TERMINATING**)
 97. (DNR: Don't know, but we do use WSF → **READ: An estimate is fine → RECORD ESTIMATE ON NEXT SCREEN**)
 98. (DNR: Don't know → **SKIP TO Q96 BEFORE TERMINATING**)

Survey Questionnaire (Cont'd)



4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?

[READ LIST]

1. Daily
2. Several times a week
3. At least once a month
4. At least once a quarter
5. At least once a year
6. (DNR: Never) → **SKIP TO Q96 BEFORE TERMINATING**

5. Is the average number of ferry crossings made by your trucks different October through March than April through September?

1. Yes, different → **ASK Q6 & Q7**
2. No, not different → **SKIP TO Q8**

6. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings. **[RECORD NUMBER: _____] [Less than once a month=0]**

97. (DNR: Don't know, but we do use WSF → **READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN**)

7. And, approximately how many crossings are made by your trucks in a typical month from April through September? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings. An estimate is fine. **[RECORD NUMBER: _____] [Less than once a month=0]**

97. (DNR: Don't know, but we do use WSF → **READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN**)

8. Approximately how many one-way crossings are made by your trucks in a typical month? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings. An estimate is fine. **[RECORD NUMBER: _____] [NOTE: Less than once a month=0]**

97. (DNR: Don't know, but we do use WSF → **READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN**)

[RESUME ASKING ALL]

9. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? **[IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]** (IF Don't know) → **[READ: An estimate is fine]**

READ LENGTH CATEGORY AND RECORD NUMBER OF TRUCKS IN EACH LENGTH CATEGORY

- | | | |
|--------------------|---------------------|-----------------------|
| a) 0 to 21 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| b) 22 to 29 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| c) 30 to 39 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| d) 40 to 49 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| e) 50 to 59 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| f) 60 to 69 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| g) 70 to 79 feet | _____ no. of trucks | 97. (DNR: Don't know) |
| h) 80 feet or more | _____ no. of Trucks | 97. (DNR: Don't know) |

Survey Questionnaire (Cont'd)



ACTIVITY

10. What ferry routes do you use for moving freight? **[READ LIST IF NECESSARY]**

1. Seattle / Bainbridge
2. Seattle / Bremerton
3. Edmonds / Kingston
4. Mukilteo **[muck-il-TEE-o]** / Clinton
5. Fauntleroy **[FONT-le-roy]** / Vashon **[VASH-on]**
6. Fauntleroy **[FONT-le-roy]** / Southworth
7. Point Defiance / Tahlequah **[TAL-i-kwah]**
8. Coupeville **[COOP-vil]** / Port Townsend
9. Anacortes **[ann-a-COR-tiss]** / San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
10. Inter-island San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
11. Vashon **[VASH-on]** / Southworth
12. Anacortes **[ann-a-COR-tiss]** / Sidney
13. (DNR: Don't know/Refused)

[IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

11. And of those routes, which ferry route do you use most often? **[ASK ONLY ROUTES MENTIONED IN Q10]**

1. Seattle / Bainbridge
2. Seattle / Bremerton
3. Edmonds / Kingston
4. Mukilteo **[muck-il-TEE-o]** / Clinton
5. Fauntleroy **[FONT-le-roy]** / Vashon **[VASH-on]**
6. Fauntleroy **[FONT-le-roy]** / Southworth
7. Point Defiance / Tahlequah **[TAL-i-kwah]**
8. Coupeville **[COOP-vil]** / Port Townsend
9. Anacortes **[ann-a-COR-tiss]** / San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
10. Inter-island San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
11. Vashon **[VASH-on]** / Southworth
12. Anacortes **[ann-a-COR-tiss]** / Sidney
13. Routes used equally
14. (DNR: Don't know/Refused)

Survey Questionnaire (Cont'd)



[RESUME ASKING ALL]

12. Which of the following categories best describes your company's line of business? **[READ LIST]**
1. Long-haul trucking
 2. City delivery trucking
 3. Truck load trucking
 4. L-T-L trucking
 5. Parcel trucking
 6. Retail trade
 7. Wholesale trade
 8. Logistics, warehousing, or third party logistics (3PL)
 9. Manufacturing
 10. Agribusiness or fishing
 11. Timber or wood products
 12. Mining
 13. Waste management
 14. Construction
 15. Other [SPECIFY_____]
 97. (DNR: Don't Know)
13. Using the ferries, which location type do you deliver freight to? **[READ LIST] [ACCEPT MULTIPLE SELECTIONS]**
1. Residential locations
 2. Retail or commercial businesses
 3. Warehouses
 4. Construction sites
 5. Some other type of place or location [SPECIFY_____]
 97. (DNR: Don't Know)

[IF MORE THAN ONE LOCATION MENTIONED IN Q13 ASK Q14 FOLLOW-UP]

14. And, which location type do you deliver the most freight to? **[REPEAT LIST IF NECESSARY]**
1. Residential locations
 2. Retail or commercial businesses
 3. Warehouses
 4. Construction sites
 5. Some other type of place or location [SPECIFY_____]
 97. (DNR: Don't Know)

Survey Questionnaire (Cont'd)



SCHEDULING

15. **[ASK IF Q5 = 1]** In a typical month from October through March, how many of your **[INSERT NUMBER FROM Q6]** freight trips are taken during...? **[READ ALOUD]**

- a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _____ **Record no of trips**
 - b. MIDDAY **[IF NEEDED: generally 9am to 3pm]** _____ **Record no of trips**
 - c. NIGHT **[IF NEEDED: generally 7pm to 6am]** _____ **Record no of trips**
- [Total = Q6]**

16. **[ASK IF Q5 = 1]** In a typical month from April through September, how many of your **[INSERT NUMBER FROM Q7]** freight trips are taken during...? **[READ ALOUD]**

- a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _____ **Record no of trips**
 - b. MIDDAY **[IF NEEDED: generally 9am to 3pm]** _____ **Record no of trips**
 - c. NIGHT **[IF NEEDED: generally 7pm to 6am]** _____ **Record no of trips**
- [Total = Q7]**

[IF Q15A>0 OR Q16A>0 THEN PEAK_HOUR_TRIPS=TRUE]

17. **[ASK IF Q5 = 2]** In a typical month, how many of your **[INSERT NUMBER FROM Q8]** freight trips are taken during..? **[READ ALOUD]**

- a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _____ **Record no of trips**
 - b. MIDDAY **[IF NEEDED: generally 9am to 3pm]** _____ **Record no of trips**
 - c. NIGHT **[IF NEEDED: generally 7pm to 6am]** _____ **Record no of trips**
- [Total = Q8]**

[IF Q17A>0 THEN PEAK_HOUR_TRIPS = TRUE]

[RESUME ASKING ALL]

18. What factors impact your decision most as to which specific ferry sailing to take? **[ACCEPT UP TO 3 RESPONSES]**
19. Which of the following has a greater impact on your decision to use or not use Washington State Ferries? The fares charged for your trucks or the time your trucks have to wait at the terminals? **[REPEAT IF NECESSARY]**
- 1. Fares charged for trucks
 - 2. Time trucks have to wait at terminals
 - 3. (DNR: Both are equal)
 - 4. (DNR: Neither- Convenience/Frequency of Sailing Mentioned)
 - 5. (DNR: Neither – Other Mentioned)
 - 6. (DNR: Don't Know/Refused)

Survey Questionnaire (Cont'd)



20. What degree of flexibility do you have when selecting travel on the ferry in terms of **the time of day** you schedule your drivers? Would you say you are...

[READ LIST]

1. Completely flexible
2. Somewhat flexible
3. Somewhat inflexible
4. Completely inflexible
5. (DNR: Don't know)

21. What degree of flexibility do you have when selecting travel on the ferry in terms of **the day of the week** you schedule your drivers? Would you say you are...?

[READ LIST]

1. Completely flexible
2. Somewhat flexible
3. Somewhat inflexible
4. Completely inflexible
5. (DNR: Don't know)

22. What factors affect your flexibility the most in terms of time of day or day of the week when you schedule freight truck trips on ferries? **[ACCEPT UP TO 3 RESPONSES]** _____

PEAK TIME PERIOD TRIPS

23. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers? **[READ LIST]**

1. A major issue or problem
2. A moderate issue or problem
3. A minor issue or problem
4. Not an issue or problem → **SKIP TO Q26**
5. (DNR: Don't know/Refused) → **SKIP TO Q26**

Survey Questionnaire (Cont'd)



24. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

1. Seattle / Bainbridge
2. Seattle / Bremerton
3. Edmonds / Kingston
4. Mukilteo **[muck-il-TEE-o]** / Clinton
5. Fauntleroy **[FONT-le-roy]** / Vashon **[VASH-on]**
6. Fauntleroy **[FONT-le-roy]** / Southworth
7. Point Defiance / Tahlequah **[TAL-i-kwah]**
8. Coupeville **[COOP-vil]** / Port Townsend
9. Anacortes **[ann-a-COR-tiss]** / San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
10. Inter-island San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
11. Vashon **[VASH-on]** / Southworth
12. Anacortes **[ann-a-COR-tiss]** / Sidney
13. (DNR: All routes)
14. None **[SKIP TO Q26]**
15. Don't know **[SKIP TO Q26]**

[FOR EACH ROUTE MENTIONED IN Q24 ASK Q25 FOLLOW-UP]

25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

[DISPLAY ONLY ROUTES MENTIONED IN Q24] _____ Record average no. of boats

1. Seattle / Bainbridge
2. Seattle / Bremerton
3. Edmonds / Kingston
4. Mukilteo **[muck-il-TEE-o]** / Clinton
5. Fauntleroy **[FONT-le-roy]** / Vashon **[VASH-on]**
6. Fauntleroy **[FONT-le-roy]** / Southworth
7. Point Defiance / Tahlequah **[TAL-i-kwah]**
8. Coupeville **[COOP-vil]** / Port Townsend
9. Anacortes **[ann-a-COR-tiss]** / San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
10. Inter-island San Juans **[san wahns]** Includes Shaw, Orcas **[OR-cuss]**, Lopez, and Friday Harbor
11. Vashon **[VASH-on]** / Southworth
12. Anacortes **[ann-a-COR-tiss]** / Sidney
13. (DNR: Don't know)

26. What strategies do you use to minimize the amount of time you or your drivers spend waiting for a ferry at the dock? **[ACCEPT UP TO 3 RESPONSES]** _____

Survey Questionnaire (Cont'd)



RESERVATIONS

27. Do you have a business account with Washington State Ferries?
1. Yes, have business account
 2. No, business account
 3. (DNR: Maybe / Don't Know)
28. Are you aware Washington State Ferries offers a vehicle reservation system?
1. Yes, aware
 2. No, not aware → **SKIP TO Q32**

[IF Q10 ROUTE EQUALS 8 OR 9 ASK Q29-Q31 OTHERWISE SKIP TO Q32]

29. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville **[COOP-vil]** /Port Townsend and Anacortes **[ann-a-COR-tiss]** routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use W-S-F's vehicle reservation system? Would you say ... **[READ LIST?]**
1. Always
 2. Often
 3. Sometimes
 4. Rarely
 5. Never → **SKIP TO Q32**
 6. (DNR: Don't Know)
30. All things considered, how satisfied are you with the vehicle reservation system that W-S-F offers?
1. Very satisfied → **SKIP TO Q32**
 2. Satisfied → **SKIP TO Q32**
 3. Neither satisfied nor dissatisfied → **SKIP TO Q32**
 4. Dissatisfied
 5. Very Dissatisfied
 6. Have never used W-S-F vehicle reservation system → **SKIP TO Q32**
31. What specifically about your experience with the vehicle reservation system made you dissatisfied? Please be as specific as possible. **[ACCEPT UP TO THREE RESPONSES]**
- 31a. What changes, if any, would you suggest? **[ACCEPT UP TO THREE RESPONSES]**

Survey Questionnaire (Cont'd)



[IF Q10 ROUTE EQUALS 1-7 OR 11 ASK Q32-Q38 OTHERWISE SKIP TO Q40INT]

32. If all of the Central Puget **[PYOO-jet]** Sound ferry routes had a reservations system for all vehicles, including commercial vehicles that require a reservation to be secured at least two hours prior to sailing and that you must check in at the tollbooth at least 30 minutes prior to your sailing to receive your guaranteed space, would your company's usage of the Central Puget **[PYOO-jet]** Sound ferries increase, decrease, or remain the same as a result of having a reservation system in place? **(IF ASKED: Central Puget [PYOO-jet] Sound routes are from Mukilteo [muck-il-TEE-o] /Clinton to Point Defiance/Tahlequah [TAL-i-kwah])**
1. Increase
 2. Same
 3. Decrease
 4. (DNR: Don't know)
 5. (DNR: Don't want reservations on Central Puget Sound routes) → **SKIP TO Q40INT**
 6. (DNR: Already use the reservation system on all the routes we use)
 7. (DNR: Don't do shipping in the Central Puget Sound region)

33INT. The current W-S-F vehicle reservation system has the following features **[READ LIST]**:

- Space is available for reservations up to two months ahead of the season schedule start date
- No reservation deposit is necessary at the time the reservation is made
- A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day
- Reservations may be cancelled and or changed once up to 5 pm of the prior day with no penalty
- If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and
- The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.

33. How likely would your company be to use this vehicle reservation system knowing you would pay 100% of the fare if your truck wasn't there on time for boarding? Would you say...? **[READ LIST]**
1. Definitely would use → **SKIP TO Q40INT**
 2. Would be very likely to use → **SKIP TO Q40INT**
 3. Would be somewhat likely to use
 4. Would be somewhat unlikely to use
 5. Would be very unlikely to use
 6. Definitely would not use
 7. (DNR: Don't know)

Survey Questionnaire (Cont'd)



34. How likely would your company be to use this vehicle reservation system knowing you would pay 75% of the fare if your truck wasn't there on time for boarding? **[REPEAT SCALE IF NEEDED]**
1. Definitely would use → **SKIP TO Q40INT**
 2. Would be very likely to use → **SKIP TO Q40INT**
 3. Would be somewhat likely to use
 4. Would be somewhat unlikely to use
 5. Would be very unlikely to use
 6. Definitely would not use
 7. (DNR: Don't know)
35. How likely would your company be to use the vehicle reservation system if the reservation knowing you would pay 50% of the fare if your truck wasn't there on time for boarding? **[REPEAT SCALE IF NEEDED]**
1. Definitely would; → **SKIP TO Q40INT**
 2. Would be very likely to → **SKIP TO Q40INT**
 3. Would be somewhat likely to
 4. Would be somewhat unlikely to
 5. Would be very unlikely to
 6. Definitely would not
 7. (DNR: Don't know)
36. How likely would your company be to use the vehicle reservation system if the reservation knowing you would pay 25% of the fare if your truck wasn't there on time for boarding? **[REPEAT SCALE IF NEEDED]**
1. Definitely would; → **SKIP TO Q40INT**
 2. Would be very likely to → **SKIP TO Q40INT**
 3. Would be somewhat likely to → **SKIP TO Q40INT**
 4. Would be somewhat unlikely to
 5. Would be very unlikely to
 6. Definitely would not
 7. (DNR: Don't know)
37. Why would you be unwilling to use a vehicle reservation system that guaranteed you a spot on a specific boat with a 25% no show charge if your truck wasn't there on time for boarding? **[PROBE AND CLARIFY]**
-
38. How much of a difference would it make in your use of a vehicle reservation system if W-S-F didn't charge the no-show fee if you ended up traveling from that terminal on a different sailing anytime that same day? Would you say that would make a ... **[READ LIST]**
1. Big Difference – I would use the vehicle reservation system a lot
 2. Small Difference – I might use it
 3. No Difference – I still wouldn't use it

Survey Questionnaire (Cont'd)



CONGESTION PRICING

[RESUME ASKING ALL]

40INT. The next set of questions are about shipping freight on the ferries during peak travel.

40. Using a 5-point scale where 1 means “strongly disagree” and 5 means “strongly agree,” to what extent do you agree or disagree with the following statement?
In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount from regular freight fares if they travel during off-peak periods.

SCALE:

1. Strongly disagree
- 2.
- 3.
- 4.
5. Strongly agree
6. (DNR: Don't Know)

[IF NEEDED: Peak Travel Periods are defined as:

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am

MONDAY – FRIDAY - WESTBOUND between 3:00 pm and 7:00 pm

SATURDAY - WESTBOUND between 12:00 and 6:00 pm

SUNDAY - EASTBOUND between 11:00 am and 5:00 pm]

[IF PEAK_HOUR_TRIPS=TRUE, ASK Q41, ELSE SKIP TO Q44]

41. If freight customers who use the ferry during peak travel periods were charged one and a half times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

_____ % [IF 100% SKIP to Q44]

97. Don't know → READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN

42. If freight customers who use the ferry during peak travel periods were charged double the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

_____ % [IF 100% SKIP to Q44]

97. Don't know → READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN

43. If freight customers who use the ferry during peak travel periods were charged three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

_____ %

97. Don't know → READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN

Survey Questionnaire (Cont'd)



44. If freight customers on overnight sailings between 9pm and 5am each day were charged just **half** of the fare currently charged for freight vehicles, what percent of your freight trips would you schedule for the 9pm and 5am time period?
_____ %
97. Don't know → **READ:** An estimate is fine. → **RECORD ESTIMATE ON NEXT SCREEN**
45. **[ASK IF Q44 IS <10%]** If the ferry system were to offer half-price fares for trucks between 9pm and 5am, what reasons might you have to continue using the ferries during the peak periods at those higher fares? **[ACCEPT UP TO THREE RESPONSES]**
46. Would a free, secure parking area on the arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?
1. Yes
2. No
3. (DNR: Don't know)
47. Do you pay your drivers by the mile, by the hour or a mix of the two?
1. By the mile only
2. By the hour only
3. Both by the mile and the hour
4. (DNR: Don't know)
48. What do you feel are the primary problems or issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better? **[PROBE AND CLARIFY]**

49. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... **[READ LIST]**
1. Increased significantly → **SKIP TO Q52**
2. Increased somewhat → **SKIP TO Q52**
3. Not changed; → **SKIP TO Q52**
4. Decreased somewhat
5. Decreased significantly
6. (DNR: Don't know) → **SKIP TO Q52**

Survey Questionnaire (Cont'd)



50. What is the primary reason for the decrease? _____ **[DO NOT READ – USE CODE LIST BELOW]**

1. (Drive around instead of using the ferry)
2. (Change in delivery schedule/delivering less often)
3. (Cost of fare to ride the ferry is too high)
4. (Ferry travel takes too long)
5. (Ferry waits are too long)
6. (Ferries are unreliable)
7. (Ferry schedule is inconvenient)
8. (Time between ferry sailings is too long)
9. (Ferry routes are not in the right location to be useful)
10. (Other: specify_____)
11. (DNR: Don't know)

51. What other reasons are there? _____ **[DO NOT READ – USE CODE LIST BELOW- ACCEPT MULTIPLE] [DO NOT SHOW RESPONSE FROM Q50]**

1. (Drive around instead of using the ferry)
2. (Change in delivery schedule/delivering less often)
3. (Cost of fare to ride the ferry is too high)
4. (Ferry travel takes too long)
5. (Ferry waits are too long)
6. (Ferries are unreliable)
7. (Ferry schedule is inconvenient)
8. (Time between ferry sailings is too long)
9. (Ferry routes are not in the right location to be useful)
10. (Other: specify_____)
11. (DNR: Don't know)

52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries...? **[READ LIST]**

1. A very good value
2. A good value
3. A poor value
4. A very poor value
5. (DNR: Don't know)

Survey Questionnaire (Cont'd)



53. Other than lowering the price, what else could Washington State Ferries do to help you move freight on the ferries? **[ACCEPT TWO RESPONSES]**
- _____

Thank Respondent for completing the full survey and hang up.

TERMINATION QUESTION – ASKED ONLY OF THOSE THAT DO NOT SHIP ON WSF

96. Do you ever ship to areas on the west side of Puget **[PYOO-jet]** Sound where you possibly could use the ferry system to transport your freight?
1. Yes
 2. No → **THANK AND TERMINATE**
97. What do you feel are the primary problems or issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better? **[ACCEPT 3 RESPONSES]** _____
98. What is the primary reason for your company NOT using the ferries to transport freight? **[DO NOT READ – USE CODE LIST BELOW]**
1. (Driving around instead of using the ferry is easier)
 2. (Our client's delivery/receiving schedule)
 3. (Cost of fare to ride the ferry is too high)
 4. (Ferry travel takes too long)
 5. (Waits at terminals are too long)
 6. (Ferries are unreliable)
 7. (Ferry schedule is inconvenient)
 8. (Time between ferry sailings is too long)
 9. (Ferry routes are not in the right location to be useful)
 10. (NO/LIMITED shipments going to west side Puget **[PYOO-jet]** Sound or Island markets)
 11. Other **[SPECIFY]**
 12. (Don't know)

Survey Questionnaire (Cont'd)



99. What other reasons do you have for not using them? **[DO NOT READ – USE CODE LIST BELOW] [DO NOT SHOW RESPONSE FROM Q98]**
1. (Driving around instead of using the ferry is easier)
 2. (Our client's delivery/receiving schedule)
 3. (Cost of fare to ride the ferry is too high)
 4. (Ferry travel takes too long)
 5. (Waits at terminals are too long)
 6. (Ferries are unreliable)
 7. (Ferry schedule is inconvenient)
 8. (Time between ferry sailings is too long)
 9. (Ferry routes are not in the right location to be useful)
 10. (NO/LIMITED shipments going to west side Puget **[PYOO-jet]** Sound or Island markets)
 11. (Other **[SPECIFY]**)
 12. (No other reasons)
 13. (Don't know/Nothing)

Thank Respondent for completing the 'Reasons for not using the ferry' survey questions and hang up.